

**Return of Private Foundation
or Section 4947(a)(1) Nonexempt Charitable Trust
Treated as a Private Foundation**

OMB No 1545-0052

2011Department of the Treasury
Internal Revenue Service

Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements

For calendar year 2011, or tax year beginning , 2011, and ending

Lumina Foundation for Education
30 S Meridian Street #700
Indianapolis, IN 46204**A** Employer identification number
351813228**B** Telephone number (see the instructions)
317-951-5300**C** If exemption application is pending, check here ☐**D 1** Foreign organizations, check here ☐**2** Foreign organizations meeting the 85% test, check here and attach computation ☐**E** If private foundation status was terminated under section 507(b)(1)(A), check here ☐**F** If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐**G** Check all that apply: ☐ Initial return ☐ Initial Return of a former public charity
☐ Final return ☐ Amended return
☐ Address change ☐ Name change**H** Check type of organization: ☒ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation**I** Fair market value of all assets at end of year (from Part II, column (c), line 16)
\$ 1082176421.
J Accounting method ☐ Cash ☒ Accrual
☐ Other (specify) _____
(Part I, column (d) must be on cash basis.)

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1	Contributions, gifts, grants, etc., received (att sch)				
2	Cl <input checked="" type="checkbox"/> if the foundn is not req to att Sch B				
3	Interest on savings and temporary cash investments				
4	Dividends and interest from securities	23,016,198.	23,942,253.	23,942,253.	
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain/(loss) from sale of assets not on line 10	63,044,118.			
b	Gross sales price for all assets on line 6a 548718000.				
7	Capital gain net income (from Part IV, line 2)		40,375,899.		
8	Net short-term capital gain				
9	Income modifications				
10a	Gross sales less returns and allowances				
b	Less Cost of goods sold				
c	Gross profit/(loss) (att sch)				
11	Other income (attach schedule) See Statement 1	16,610.	5,068,500.		
12	Total. Add lines 1 through 11	86,076,926.	69,386,652.	23,942,253.	
13	Compensation of officers, directors, trustees, etc	1,833,754.	238,023.		1,058,435.
14	Other employee salaries and wages	3,862,222.	358,366.		3,450,637.
15	Pension plans, employee benefits	4,994,133.	167,709.		2,583,101.
16a	Legal fees (attach schedule) See St 2	256,777.	93,679.		120,876.
b	Accounting fees (attach sch) See St 3	120,685.	4,611.		100,711.
c	Other prof fees (attach sch) See St 4	11,904,370.	6,296,801.		5,083,502.
17	Interest		178,730.		
18	Taxes (attach schedule)(see instrs) See Stmt 5	555,966.	465,385.		
19	Depreciation (attach See Stmt 19 sch) and depletion	632,314.	52,222.		
20	Occupancy	616,223.	46,701.		564,583.
21	Travel, conferences, and meetings	2,165,944.	20,628.		2,113,193.
22	Printing and publications	750,877.	5,448.		759,112.
23	Other expenses (attach schedule) See Statement 6	1,076,544.	5,390,410.		901,898.
24	Total operating and administrative expenses. Add lines 13 through 23	28,769,809.	13,318,713.		16,736,048.
25	Contributions, gifts, grants paid Part XV	48,736,583.			47,614,822.
26	Total expenses and disbursements. Add lines 24 and 25	77,506,392.	13,318,713.	0.	64,350,870.
27	Subtract line 26 from line 12:				
a	Excess of revenue over expenses and disbursements	8,570,534.			
b	Net investment income (if negative, enter -0-)		56,067,939.		
c	Adjusted net income (if negative, enter -0-)			23,942,253.	

SCANNED NOV 26 2012

ADMINISTRATIVE AND OPERATING EXPENSES

619

Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)

Beginning of year

End of year

(a) Book Value

(b) Book Value

(c) Fair Market Value

ASSETS	1	Cash -- non-interest-bearing			
	2	Savings and temporary cash investments	68,133,926.	59,437,443.	59,437,443.
	3	Accounts receivable	996,287.		
		Less: allowance for doubtful accounts	1,006,837.	996,287.	996,287.
	4	Pledges receivable			
		Less: allowance for doubtful accounts			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach sch)			
		Less: allowance for doubtful accounts			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges	905,665.	473,933.	473,933.
	10a	Investments -- U.S. and state government obligations (attach schedule)	83,567,005.		
	b	Investments -- corporate stock (attach schedule) Statement 7	470,396,806.	514,183,384.	514,183,384.
	c	Investments -- corporate bonds (attach schedule) Statement 8	80,809,836.	90,502,073.	90,502,073.
LIABILITIES	11	Investments -- land, buildings, and equipment basis			
		Less: accumulated depreciation (attach schedule)			
	12	Investments -- mortgage loans			
	13	Investments -- other (attach schedule) Statement 9	449,626,625.	414,770,658.	414,770,658.
	14	Land, buildings, and equipment basis	6,170,175.		
		Less: accumulated depreciation (attach schedule) See Stmt 10	4,357,532.	1,812,643.	1,812,643.
	15	Other assets (describe)			
	16	Total assets (to be completed by all filers -- see the instructions. Also, see page 1, item I)	1,156,840,104.	1,082,176,421.	1,082,176,421.
	17	Accounts payable and accrued expenses	4,399,022.	6,272,208.	
	18	Grants payable	25,851,428.	28,707,968.	
FUNDS	19	Deferred revenue			
	20	Loans from officers, directors, trustees, & other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe)			
	23	Total liabilities (add lines 17 through 22)	30,250,450.	34,980,176.	
		Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. <input checked="" type="checkbox"/>			
	24	Unrestricted	1,126,589,654.	1,047,196,245.	
BALANCE SHEETS	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. <input type="checkbox"/>			
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, building, and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances (see instructions)	1,126,589,654.	1,047,196,245.	
	31	Total liabilities and net assets/fund balances (see instructions)	1,156,840,104.	1,082,176,421.	

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year -- Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	1,126,589,654.
2	Enter amount from Part I, line 27a	2	8,570,534.
3	Other increases not included in line 2 (itemize)	3	
4	Add lines 1, 2, and 3	4	1,135,160,188.
5	Decreases not included in line 2 (itemize) See Statement 11	5	87,963,943.
6	Total net assets or fund balances at end of year (line 4 minus line 5) -- Part II, column (b), line 30	6	1,047,196,245.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shares MLC Company)

(b) How acquired
P — Purchase
D — Donation(c) Date acquired
(month, day, year)(d) Date sold
(month, day, year)

1 a			
b			
c	See Stmt 20		
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any	(l) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h))
a			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)

— [If gain, also enter in Part I, line 7
If (loss), enter -0- in Part I, line 7] —

2

40,375,899.

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6).

If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8

3

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes☒ No

If 'Yes,' the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (column (b) divided by column (c))
2010	62,717,768.	1,075,680,578.	0.058305
2009	63,859,935.	1,009,983,344.	0.063229
2008	64,345,923.	1,236,336,284.	0.052046
2007	60,913,704.	1,406,464,295.	0.043310
2006	58,713,698.	1,279,335,144.	0.045894

2 Total of line 1, column (d)

2

0.262784

3 Average distribution ratio for the 5-year base period — divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years

3

0.052557

4 Enter the net value of noncharitable-use assets for 2011 from Part X, line 5

4

1,116,053,056.

5 Multiply line 4 by line 3

5

58,656,400.

6 Enter 1% of net investment income (1% of Part I, line 27b)

6

560,679.

7 Add lines 5 and 6

7

59,217,079.

8 Enter qualifying distributions from Part XII, line 4

8

64,719,051.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 – see instructions)

1 a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter 'N/A' on line 1. Date of ruling or determination letter _____ (attach copy of letter if necessary – see instrs)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	560,679.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, column (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	560,679.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	560,679.
6 Credits/Payments			
a 2011 estimated tax pmts and 2010 overpayment credited to 2011	6a	1,089,122.	
b Exempt foreign organizations – tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d	2,456.	
7 Total credits and payments. Add lines 6a through 6d	7	1,091,578.	
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	0.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	530,899.	
11 Enter the amount of line 10 to be credited to 2012 estimated tax	11	0.	

Part VII-A Statements Regarding Activities

	Yes	No
1 a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)? <i>If the answer is 'Yes' to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities</i>		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation <input type="checkbox"/> \$ 0. (2) On foundation managers <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If 'Yes,' attach a detailed description of the activities.</i>		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If 'Yes,' attach a conformed copy of the changes</i>		X
4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	X	
b If 'Yes,' has it filed a tax return on Form 990-T for this year?	X	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If 'Yes,' attach the statement required by General Instruction T.</i>		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If 'Yes,' complete Part II, column (c), and Part XIV.</i>	X	
8 a Enter the states to which the foundation reports or with which it is registered (see instructions). DE IN		
b If the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If 'No,' attach explanation</i>	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? <i>If 'Yes,' complete Part XIV</i>		X
10 Did any persons become substantial contributors during the tax year? <i>If 'Yes,' attach a schedule listing their names and addresses.</i>		X

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes', attach schedule (see instructions)	See Stmt 21	11	X	
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If 'Yes,' attach statement (see instructions).		12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <u>WWW.Luminafoundation.org</u>		13	X	
14	The books are in care of <u>David A. Brown</u> Located at <u>30 S. Meridian Street</u>	Telephone no <u>317-951-5300</u> ZIP + 4 <u>46204</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	N/A	15	N/A	N/A
16	At any time during calendar year 2011, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?		16		X

See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If 'Yes,' enter the name of the foreign country

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the 'Yes' column, unless an exception applies.

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception. Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is 'Yes' to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here		<input type="checkbox"/>
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2011?		<input type="checkbox"/>
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011? If 'Yes,' list the years <u>20__</u> , <u>20__</u> , <u>20__</u> , <u>20__</u>	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer 'No' and attach statement - see instructions.)		N/A
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here <u>20__</u> , <u>20__</u> , <u>20__</u> , <u>20__</u>		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
b If 'Yes,' did it have excess business holdings in 2011 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2011.)		X
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2011?		X

Part VII-B: Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions)

☒ Yes ☐ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No**b** If any answer is 'Yes' to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

Organizations relying on a current notice regarding disaster assistance check here

☐**5b****X****c** If the answer is 'Yes' to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

See Stmt 22

☒ Yes ☐ No

If 'Yes,' attach the statement required by Regulations section 53.4945-5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?☐ Yes ☒ No**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?**6b****X**

If 'Yes' to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ Yes ☒ No**b** If 'Yes,' did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b**Part VIII: Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1** List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Statement # 13	0	1,833,754.	550,480.	6,925.

2 Compensation of five highest-paid employees (other than those included on line 1— see instructions). If none, enter 'NONE.'

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Statement 14	40	813,052.	364,927.	7,438.

Total number of other employees paid over \$50,000

8

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3** Five highest-paid independent contractors for professional services (see instructions). If none, enter 'NONE.'

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
See Statement # 15		
		4,615,971.

Total number of others receiving over \$50,000 for professional services

35

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
1 Conferences and Convenings Statement # 16	
	2,868,404.
2 Research and Publications Statement # 16	
	1,792,753.
3 Philanthropy Statement # 16	
	358,551.
4 Technical Assistance Statement 16	
	2,151,303.

Part IX-B Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 N/A	
2	
All other program-related investments. See instructions	
3	
Total. Add lines 1 through 3	0.

BAA

Form 990-PF (2011)

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes.		
a Average monthly fair market value of securities	1a	1,080,293,307.
b Average of monthly cash balances	1b	51,719,202.
c Fair market value of all other assets (see instructions)	1c	1,036,279.
d Total (add lines 1a, b, and c)	1d	1,133,048,788.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2 Acquisition indebtedness applicable to line 1 assets	2	0.
3 Subtract line 2 from line 1d	3	1,133,048,788.
4 Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	16,995,732.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,116,053,056.
6 Minimum investment return. Enter 5% of line 5	6	55,802,653.

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1 Minimum investment return from Part X, line 6	1	55,802,653.
2a Tax on investment income for 2011 from Part VI, line 5	2a	560,679.
b Income tax for 2011 (This does not include the tax from Part VI)	2b	
c Add lines 2a and 2b	2c	560,679.
3 Distributable amount before adjustments Subtract line 2c from line 1	3	55,241,974.
4 Recoveries of amounts treated as qualifying distributions	4	1,887,734.
5 Add lines 3 and 4	5	57,129,708.
6 Deduction from distributable amount (see instructions)	6	
7 Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	57,129,708.

Part XII Qualifying Distributions (see instructions)

1 Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a Expenses, contributions, gifts, etc. — total from Part I, column (d), line 26	1a	64,350,870.
b Program-related investments — total from Part IX-B	1b	
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	368,181.
3 Amounts set aside for specific charitable projects that satisfy the:		
a Suitability test (prior IRS approval required)	3a	
b Cash distribution test (attach the required schedule)	3b	
4 Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	64,719,051.
5 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions)	5	560,679.
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6	64,158,372.

Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2010	(c) 2010	(d) 2011
1 Distributable amount for 2011 from Part XI, line 7				57,129,708.
2 Undistributed income, if any, as of the end of 2011:				
a Enter amount for 2010 only			23,726,487.	
b Total for prior years: 20____, 20____, 20____		0.		
3 Excess distributions carryover, if any, to 2011:				
a From 2006				
b From 2007				
c From 2008				
d From 2009				
e From 2010				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2011 from Part XII, line 4. ► \$ 64,719,051.				
a Applied to 2010, but not more than line 2a			23,726,487.	
b Applied to undistributed income of prior years (Election required — see instructions)		0.		
c Treated as distributions out of corpus (Election required — see instructions)	0.			
d Applied to 2011 distributable amount				40,992,564.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2011 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e. Subtract line 5	0.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable amount — see instructions		0.		
e Undistributed income for 2010 Subtract line 4a from line 2a. Taxable amount — see instructions			0.	
f Undistributed income for 2011 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2012				16,137,144.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	0.			
8 Excess distributions carryover from 2006 not applied on line 5 or line 7 (see instructions)	0.			
9 Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2007				
b Excess from 2008				
c Excess from 2009				
d Excess from 2010				
e Excess from 2011				

N/A

b Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

(4) Gross investment income

[illegible]

See Statement for Line 2a

Part XV Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year See Statement 17				47,614,822.
Total				▶ 3a 47,614,822.
b Approved for future payment See Statement 18				28,707,968.
Total				▶ 3b 28,707,968.

Lumina Foundation For Education
Tax Return for Year Ending

December 31, 2011

Tax ID 35-1813228

Form 990 PF
Part 1 Line 11

Other Income

Statement Number 1

	(A) Revenue Per Books	(B) Net Investment Income	(c) Adjusted Net Income
Miscellaneous Income	\$ 16,610	\$ 16,610	
Miscellaneous from Tax Letters		78,122	
Total of Other Income listed on K-1s		4,973,768	
Total		<u>\$ 5,068,500</u>	

Lumina Foundation For Education
Tax Return for Year Ending

December 31, 2011

Tax ID 35-1813228

Form 990 PF

Legal Fees

Statement Number 2

Part 1

Line 16a

Description	(A)	(B)	(C)	(D)
	Expense per books	Net Investment Expense	Adjusted Net Income	Disbursements for charitable purposes (cash basis only)
	\$ 256,777	\$ 93,679	\$	\$ 120,876
Legal Fees	\$ 256,777	\$ 93,679	\$ -	\$ 120,876

Lumina Foundation For Education
Tax Return for Year Ending

December 31, 2011

Tax ID 35-1813228

Form 990 PF

Accounting Fees

Statement Number 3

Part 1 Line 16b

Description	(A) Expense per books	(B) Net Investment Expense	(C) Adjusted Net Income	(D) Disbursements for charitable purposes (cash basis only)
	\$ 120,685	\$ 4,611	\$ -	\$ 100,711
Accounting Fees	\$ 120,685	\$ 4,611	\$ -	\$ 100,711

Lumina Foundation For Education
Tax Return for Year Ending

December 31, 2011

Tax ID 35-1813228

Form 990 PF
Part 1

Other Professional

Statement Number 4

Line 16c

Description	(A)	(B)	(C)	(D)
	Expense per books	Net Investment Expense	Adjusted Net Income	Disbursements for charitable purposes (cash basis only)
Publication Research Projects (Consulting for Research, Editing and Publishing)	\$ 765,972	\$	\$ 0	\$ 795,898
Investment Managers, Brokerage, Custodian and Investment Consulting	7,019,845	6,296,801	0	-
Consulting on Employee Development, Benefits & Compensation	5,250	-	0	9,210
Software (consulting for development, enhancements and maintenance)	304,359		0	327,142
Grant Evaluations	488,702	-		519,563
Grant Program Development	2,960,303			3,038,123
General Consulting	359,939		0	393,566
Total	\$ <u>11,904,370</u>	\$ <u>6,296,801</u>	\$ <u>0</u>	\$ <u>5,083,502</u>

Lumina Foundation For Education
Tax Return for Year Ending

December 31, 2011

Tax ID 35-1813228

Form 990 PF

Taxes

Statement Number 5

Part 1

Line 18

Description	(A) Expense per books	(B) Net Investment Expense	(C) Adjusted Net Income	(D) Disbursements for charitable purposes (cash basis only)
Excise Tax Current Year	\$ 780,470	\$ 0	\$ 0	0
Deferred Excise Taxes	(224,504)	0	0	0
Foreign Taxes paid on Tax Letter	0	74,764	0	0
Foreign Taxes paid on K-1s	0	390,621	0	0
Total Taxes	<u>\$ 555,966</u>	<u>\$ 465,385</u>	<u>\$ 0</u>	<u>0</u>

Lumina Foundation For Education**Tax ID 35-1813228****Tax Return for Year Ending****December 31, 2011****Form 990 PF****Other Expenses****Statement Number 6****Part 1****Line 23**

Description	(A)	(B)	(C)	(D)
	Expense per books	Net Investment Expense	Adjusted Net Income	Disbursements for charitable purposes (cash basis only)
Insurance Expense	\$ 105,631	\$ 18,325	\$ 0	\$ 85,202
Employee Recruiting	24,921	51	0	24,865
Equipment Maintenance	291,311	77,405	0	205,018
Seminars & Training	84,441	8,291	0	75,198
Dues	258,081	6,618	0	250,703
Sponsorships	107,991	293	0	107,664
Subscriptions and office supplies	50,985	3,115	0	47,512
Miscellaneous	107,320	0	0	105,736
Amortization of Computer Software	45,863		0	0
Expenses on K-1s		5,276,312	0	0
Total Other Expenses	\$ 1,076,544	\$ 5,390,410	\$ 0	\$ 901,898

Lumina Foundation For Education**Tax ID 35-1813228****Tax Return for Year Ending****December 31, 2011****Form 990 PF****Investments****Statements Number****7, 8 & 9****Part II Lines 10, 12, and 13**

		Beginning of year (a) Book Value	End of Year (b) Book Value	(c) Fair Market Value
Line 10a	U. S. & state government obligations	\$ 83,567,005	\$ -	\$ -
Line 10b	Corporate Stocks	470,396,806	514,183,384	514,183,384
Line 10c	Corporate Bonds	80,809,836	90,502,073	90,502,073
Line 12	Mortgage Loans	0	0	0
Line 13	Other	449,626,625	414,770,658	414,770,658
		<u>\$ 1,084,400,272</u>	<u>\$ 1,019,456,115</u>	<u>\$ 1,019,456,115</u>

Lumina Foundation For Education**Tax ID 35-1813228****Tax Return for Year Ending****December 31, 2011****Form 990 PF****Statement Number 10****Part II****Line 14****Land, Buildings and Equipment**

	Beginning of year		End of Year	
	(a) Book Value	(b) Book Value	(c) Fair Market Value	
		(Net of writeoffs)	(Net of writeoffs)	
Leasehold Improvements	\$ 3,693,596	\$ 3,751,790	\$ 3,751,790	
Accumulated Depreciation	(2,291,730)	(2,680,379)	(2,680,379)	
Furniture and Equipment	2,379,040	2,418,384	2,418,384	
Accumulated Depreciation	(1,387,502)	(1,677,152)	(1,677,152)	
Net Improvements, Furniture and Equipment	\$ 2,393,404	\$ 1,812,643	\$ 1,812,643	

Lumina Foundation For Education

Tax ID 35-1813228

Tax Return for Year Ending

December 31, 2011

Form 990 PF

Statement Number

11

Part III

Line 3 and 5

Increases/Decreases on part of income

Net Unrealized Investment Loss

\$ 87,963,943

Net Unrealized Investment Loss

\$ 87,963,943

Lumina Foundation welcomes LOIs year-round from eligible organizations seeking funds for work that fits within Lumina's mission and guidelines. Generally we review unsolicited inquiries through the end of September. Inquiries submitted after September may be held for consideration until the following year.

Organizations may submit more than one inquiry at any one time.

An LOI should describe the proposed work in three to five pages, using the questions below as guidance:

What are the intended outcomes, and how will the work achieve them? How does the work accelerate progress on Lumina's overarching goal (by 2025, 60 percent of the population in the United States will hold a high-quality postsecondary degree or credential)?

Why is this work important to pursue at this time?

What special qualifications does the organization bring to this effort?

What other organizations are involved, if any? How will they contribute to the work?

How does the proposed work relate to the applicant organization's mission?

What is the geographic scope of the proposed work?

What is the total cost of the effort? What amount do you seek from Lumina Foundation and for what

The Foundation considers only those inquiries that:

Include a completed cover sheet .DOC | 200k, not to exceed one page.

Are submitted on the letterhead of the sponsoring organization or institution.

Applicants are strongly encouraged to submit LOIs electronically. Please send the LOI (on letterhead) and completed cover sheet as attachment to newinquiry@luminafoundation.org. Please do not send any additional materials (binders, media, etc.) Applicants are welcome to submit inquiries by mail at the address below but are asked not to submit a letter both electronically and by mail.

If you cannot submit electronically, please send grant inquiries via mail to:

Program Office—"New Inquiry"

Lumina Foundation for Education

P.O. Box 1806

Indianapolis, IN 46206-1806

The review process

An internal review panel carefully reviews every LOI that meets foundation guidelines. Following the initial review, we will inform applicants within two months of receipt whether the inquiry fits our current priorities and resources. Due to limited resources, we cannot request proposals from all inquiries that meet our criteria. If we decide to request a full proposal, a Program Officer will contact the applicant to request additional information and to provide instructions on applying for a grant. An invitation to submit a proposal does not guarantee funding.

An internal review panel also carefully considers all solicited proposals; occasionally, we invite external experts to review proposals as well. We are diligent in our efforts to respond promptly to proposals. Assuming potential grantees' timely responses to requests for information, the entire review and approval process typically takes approximately six months.

Part VIII

Information About Officers, Directors, Trustees

Statement Number 13

Line 1 Officers and Directors

(a)	(b)	(c)	(d)	(e)
Name and Address Note (1)	Title/ Ave Hours Worked Per Week Note (2)	Total Paid Compensation	Deferred Compensation and Employee Benefit Expense	Expense Account Other Allowances
Gerald L Bepko, Esq	Director 2	27,000	0	0
Norris Darrell Jr., Esq	See Note 3 Director 0	6,250	0	0
James C. Lintzenich	Director 2	30,500	0	0
Marie V. McDemmond	Director 2	38,500	0	0
John M. Mutz	Director 2	29,000	0	0
J Bonnie Newman	Director 2	29,500	0	0
Michael L. Smith	Director 2	30,000	0	0
Frank D. Alvarez	Director 2	30,000	0	0
Laura Palmer Noone	Director 1	26,500	0	0
Belle Wheelan	Director 2	23,500	0	0
Mark Yudof	Director 2	25,500	0	0
F Joseph Loughrey	Director 1	23,500	0	0
Subtotal for Directors		319,750	0	0
Officers				
Jamie P. Merisotis	President & CEO 40+	559,113	98,753	1,320
J. David Maas	Vice-President, Treasurer & CFO 40+	247,362	140,438	1,395
Juan Suarez	Vice-President - External Affairs 40+	211,233	75,447	1,570
James Applegate	Vice-President - Program Development 40+	240,064	116,495	1,320
Holiday McKiernan	President, Secretary, and General Counsel 40+	256,233	119,348	1,320
		1,514,004	550,480	6,925
Totals for Directors and Officers		1,833,754	550,480	6,925
		See Note 4	See Note 5	See Note 6

Line 1 Officers and Directors

Notes:

1) Address for all Directors and Officers is 30 South Meridian Street, Suite 700, Indianapolis, IN 46204

2) Director compensation is based on the number of Board and committee meetings attended during the year. Actual amounts paid fluctuate among members based on their assignments.

3) Directors: Mr. Darrell retired April 2011 (after attending meetings in January - April)

4) Total Paid Compensation

Officers' compensation is set by a Committee of the Board composed entirely of independent directors who utilize compensation data of comparable private foundations and grantmaking institutions when establishing Executive and Director compensation to ensure that it is appropriate and reasonable. The Committee engages outside legal and compensation consultants to advise it.

5) Benefits and Deferred Compensation

Benefits and Deferred Compensation include Employer 401(k) matching funds (\$72,960) and officer contributions for 401(k) and 457 plans (\$151,500)

6) Expense Account and Other Allowances

Directors and Officers do not have an expense account or allowance. They are reimbursed for actual business expenses. The amount reflected in column "e" includes parking and miscellaneous taxable and non-taxable work related expenses

The Directors and Officers of the Foundation are responsible for managing assets of approximately \$1 billion to advance the Foundation's charitable mission of expanding access and success in postsecondary education. In 2011, the assets decreased 6.48 percent (after payment of grant and operational expenses) from \$1.2 billion to \$1.1 billion. Investment earnings supported the grants payout of \$47.7 million.

In addition to managing the assets and the grant portfolio, the Foundation leaders exercised oversight of the ambitious agenda of activities to expand the impact of grants, including the dissemination of research through grants and publications, a robust web site, and strategic media and public outreach. The Foundation leaders hold the Foundation to high standards of transparency and accountability for the effectiveness of its work by supporting a series of external evaluations, publishing an annual report and posting evaluation information on its web site.

Lumina Foundation For Education
Form 990 PF

Tax ID 35-1813228

Tax Return for Year Ending
Information About Officers, Directors, Trustees
Highly Paid Staff

December 31, 2011

Part VIII

Statement Number 14

Line 2

Staff

		(a)	(b)	(c)	(d)	(e)
Name and Address Note (1)	Title	Ave Hours Worked Per Week	Total Paid Compensation	Total Employee Benefit Expense	Expense	
					Account	Other Allowances Note (2)
Indira Anand	Director, Information Technology	40	129,493	43,192		1,600
Sam Cargile Note (3)	Vice-President for Grantmaking	40	176,408	103,991		2,388
Eileen Scott	Director, Investments	40	194,441	87,427		1,600
Elizabeth Gutierrez	Director, State Policy	40	133,545	33,724		1,600
Dewayne A. Matthews Note (3)	Vice-President for Policy and Strategy	40	179,165	96,594		250
			813,052	364,927		7,438

Notes:

1) Address for all staff is 30 South Meridian Street, Suite 700 Indianapolis, IN 46204

2) Staff does not receive an expense account or allowance. They are reimbursed for actual Business Expenses. The amount listed in column E is for parking (\$1,500.00) and miscellaneous taxable and non-taxable payments.

3) Lumina has Vice-President positions that are not an officer of the corporation.

Lumina Foundation For Education
Form 990 PF

Tax ID 35-1813228

Tax Return for Year Ending

December 31, 2011

Part VIII

**Information About Officers, Directors, Trustees
Highly Paid Staff and Contractors**

Statement Number 15

Line 3

Contractors

(a) Name and address	(b) Type of Service	(c) Compensation
CornerStone Partners, LLC 675 Peter Jefferson Parkway, Suite 160 Charlottesville, VA 22911	Investment consulting (contracted Chief Investment Officer functions)	\$ 1,979,449
MDC, Inc 307 Main Street Durham, NC 27701	Program Expansion	1,300,000
Highclere International Investments 253 Bayberry Lane Westport, CT 06880	Investment Manager	562,761
Sanderson Investments 250 South Wacker Drive, Suite 220 Chicago, IL 60606	Investment Manager	393,182
Northern Trust Company 50 S. LaSalle Street Chicago, IL 60603	Custodial and investment reporting	380,579
		<u>4,615,971</u>

Lumina Foundation For Education
Form 990 PF

Tax ID 35-1813228

Part IX - A

Tax Return for Year Ending
Summary of Direct Charitable Activities

December 31, 2011
Statement Number

16

Line 1

Direct Charitable Activities

Description

Direct Charitable Activities

The mission of Lumina Foundation is to expand access and success in education beyond high school, particularly among adults, first-generation college students, low-income students, and students of color. This mission is directed toward a single, overarching Big Goal – to increase the percentage of Americans with high-quality degrees and credentials by the year 2025. This goal is a national priority for several reasons.

Higher education is a prerequisite to success in a knowledge-based society and economy

The social and economic opportunities facing our country can best be addressed by educating many more people beyond high school. As we attain the goal, we improve the economy, strengthen civic engagement and reduce the costs of crime, poverty and health care and, in short, improve the human condition.

Higher education attainment rates among adults, first-generation college-going students, low-income students and students of color are significantly lower than those of other students. This gap has endured for decades and is now widening. This attainment gap is alarming given the country's demographic trends and economic needs.

The Foundation carries out several direct charitable programs in support of this mission. These include the following:

Lumina Foundation For Education
Form 990 PF

Tax ID 35-1813228

Part IX - A Tax Return for Year Ending
Summary of Direct Charitable Activities

December 31, 2011
Statement Number 16

Line 1 Direct Charitable Activities

Description

Conferences and Convenings. The Foundation convenes groups of higher education leaders, policy makers, researchers, and others who are actively involved in the effort to expand access and success in higher education, particularly to hard-to-reach populations including adults who originally chose not to pursue higher education after high school, first generation students, low-income students, and students of color. These convenings are focused on bringing together key stakeholders on a specific topic with the objective being both to share information and to develop actionable, measurable next steps. The topics range from ways to overcome barriers to higher education to effective strategies to increase the rate of persistence and graduation among students who enroll in college. The Foundation disseminates the results of these convenings on its website to leverage the knowledge gained for the benefit of others. In 2011 the Foundation held 41 convenings; 28 at the Foundation's offices, 7 off site, but in Indianapolis, and 6 out-of-state. The location of the convening is based on the topic and the participants. The total number of individuals participating in Foundation convenings was 1,797 with the average convening size being 44 participants. In addition to this convening strategy, the Foundation also actively seeks opportunities to share with external audiences the urgency of the need to increase degree attainment. Superficially, Foundation executives also participate actively in conferences on these subjects in the US and abroad. During 2011 the CEO made more than 50 keynote speeches and the Foundation executives and staff participated in more than 85 conferences to share Lumina's knowledge with other attendees.

\$ 2,868,404

Research and Publications. The Foundation conducts substantial research on issues affecting access and success in higher education and makes such research widely available at no charge. For example, in 2011, the Foundation released the second edition of its seminal report "A stronger nation through higher education: how and why Americans must achieve a "big goal" for college attainment." This report offers a compelling case for the need to increase dramatically the higher education attainment rates, as a state-by-state analysis of the education level of residents, showing the work that must be done to accomplish the attainment goal of 60%. Based on the research and analysis of "A Stronger Nation", Lumina released policy briefs for each state that addressed the issues and challenges of each state in reaching the 60% attainment goal. In addition to "A Stronger Nation", during 2011, the Foundation released two issues of "Focus" - this is a publication that highlights a significant issue in higher education. The research and publication work is essential to the Foundation's efforts to build public will around the issues of higher education access and attainment - to move key stakeholders, and the broader public, beyond mere awareness of these issues to action based on the urgency the issues.

1,792,753

Lumina Foundation For Education
Form 990 PF

Tax ID 35-1813228

Part IX - A Tax Return for Year Ending
Summary of Direct Charitable Activities

December 31, 2011
Statement Number 16

Line 1 Direct Charitable Activities

Description

Philanthropy. The Foundation is actively engaged in supporting the philanthropic sector in general, as well as higher education. Foundation executives are active with philanthropic organizations in the Indianapolis community, where the Foundation is headquartered, as well as with national and international philanthropic organizations that focus on the need to increase access to higher education, as well as retention and ultimately completion of degree programs. Foundation executives and staff members also serve on the boards of local and national boards. 358,551

Technical Assistance. The Foundation provides technical assistance to other stakeholders working in the field of higher education, as well as to policy makers who are tasked with developing solutions to improve access and success in higher education. Foundation executives and staff regularly provide technical advice and assistance to about critical issues such as the state of access to higher education, the range of programs that have been initiated to increase such access and to enhance the likelihood of success. This includes providing briefings and/or testimony at the request of policy makers on matters within its expertise. The Foundation uses nonpartisan research and analysis to provide background on the wide array of issues impacting higher education. In the case of legislative committee or subcommittee sessions, the Foundation provides testimony only upon written request of the chair of the applicable committee or subcommittee, and ensures that its testimony is available to all committee or subcommittee members. 2,151,303

\$ 7,171,011

Lumina Foundation For Education

Tax Return for Year Ending

Tax ID 35-1813228
December 31, 2011

Form 990 PF

Part XV

Line 3 a

Grants and Contributions Paid during the Year

Statement Number 17

All of the following organizations are classified as publicly supported charities. Lumina Foundation makes grants to organizations that are classified as tax-exempt under section 501(c)(3) of the Internal Revenue Code and as public charities under section 509(a)(1), (2), or (3) of the Code, or to public organizations that are designated under section 170(c) of the Code. Please note that Lumina Foundation for Education does not make grants to (a.) supporting organizations controlled by disqualified persons to Lumina, or (b.) Type III supporting organizations that are not functionally integrated Type III supporting organizations (as such terms are defined in the Internal Revenue Code)

Purpose of grant
or contribution

Amount

See the attached Annual Report Financial Information for Grant detail by Theme.

\$ 45,778,585

See the attached Annual Report Financial Information for Special Programs

1,836,237

Grand Total Grants Disbursed

\$ 47,614,822

Lumina Foundation For Education
Tax Return for Year Ending

Tax ID 35-1813228

December 31, 2011

Statement Number 18

Form 990 PF

Part XV

Line 3 b

Grants and Contributions Approved for Future Payment

Recipient (Must be a 501(c)(3))	Purpose of grant or contribution	Amount
See Annual Report Financial Information - 2010 Grants by Theme for detail and purpose (attached to statement for Grants Paid)		\$ 28,940,450
See Annual Report Financial Information Special Programs - 2010 for detail and purpose (attached to statement for Grants Paid)		5,750
Less FASB required discount on Grants payable in excess of 12 months		<u>(238,232)</u>
	Net Grants payable per books	<u>\$ 28,707,968</u>

Annual Report Financial Information - 2011

Grants

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Access								
5519 STD American Student Achievement Institute 931 25th Street Columbus, IN 47201 To increase opportunities for low-income, first-generation and minority students to earn college credits in high school	\$300,000	\$0	\$300,000	\$0	\$0	\$0	\$0	\$0
5444 STD Central Indiana Community Foundation 615 North Alabama Street Room 119 Indianapolis, IN 46204 To create the College Readiness Fund, a funding collaborative to improve and expand college access in Marion County	\$1,020,000	\$0	\$520,000	\$0	\$0	\$0	\$0	\$500,000
5793 STD National Academy of Sciences 500 Fifth Street, Northwest, 11th Floor Washington, DC 20001 To develop improved measures of productivity within U.S. higher education	\$300,000	\$0	\$300,000	\$0	\$0	\$0	\$0	\$0
5897 STD Possibility Project, The 104 West 27th Street, 12th Floor New York, NY 10001 To research, document and disseminate the key factors for City at Peace's success in advancing high school graduation and college enrollment.	\$22,000	\$0	\$22,000	\$0	\$0	\$0	\$0	\$0
Total for Access	\$1,642,000	\$0	\$1,142,000	\$0	\$0	\$0	\$0	\$500,000
Attainment/Retention								
5498 STD American Association of Community Colleges One Dupont Circle, NW Suite 410 Washington, DC 20036 To build policy analysis capacity at the organization to advance the objectives of the Achieving the Dream initiative at the national level	\$200,000	\$0	\$200,000	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Attainment/Retention								
5730 STD Board of Trustees of the University of Illinois, The 1901 South First Street Suite A Champaign, IL 61820-7406 To facilitate the dissemination and adoption of best practices in the assessment of college learning outcomes.	\$75,000	\$0	\$75,000	\$0	\$0	\$0	\$0	\$0
5928 STD Indiana Housing and Community Development Authority 30 South Meridian Street Suite 1000 Indianapolis, IN 46204 To improve college access and success rates for parents of Twenty-first Century Scholars and their dependents	\$250,000	\$0	\$250,000	\$0	\$0	\$0	\$0	\$0
5517 STD National Center for Educational Accountability 4030-2 West Braker Lane, Suite 200 Austin, TX 78759 Transferred to Grant# 7328 - ACT, Inc. To build state capacity to share data across educational sectors.	\$200,000	\$0	\$0	\$200,000	\$0	\$0	\$0	\$0
5883 STD Trustees of Indiana University, The P. O. Box 1847 Bloomington, IN 47402-1847 To develop and implement the Indiana Workforce Intelligence System, a student unit record data system that integrates education and workforce data	\$200,000	\$0	\$200,000	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Attainment/Retention								
5084 STD Trustees of the University of Pennsylvania 3451 Walnut Street Room P-221 Philadelphia, PA 19104 To analyze, disseminate and engage six different institutions in implementing strategies and findings as identified by the National Black Male College Achievement Study.	\$100,000	\$0	\$100,000	\$0	\$0	\$0	\$0	\$0
Total for Attainment/Retention	\$1,025,000	\$0	\$825,000	\$200,000	\$0	\$0	\$0	\$0
Civic Engagement Budget								
5887 STD Calvert Social Investment Foundation 7315 Wisconsin Avenue Bethesda, MD 20814 To support NRFC's planned sunset, helping the organization finalize work, including the completion and disseminate its end of project reports, sharing lessons and recommendations from its ten-year work.	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
5887 STD Community Alliance of the Far Eastside 8902 East 38th Street Indianapolis, IN 46226 To provide community building and economic development on the far eastside, with the ultimate goal of strengthening educational attainment for students and families.	\$75,000	\$0	\$75,000	\$0	\$0	\$0	\$0	\$0
95 STD Grantmakers for Education 720 SW Washington Street, Suite 605 Portland, OR 97205 To develop and produce a "Funders Guide on Developmental Education."	\$0	\$16,750	\$16,750	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011

Grants

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Civic Engagement Budget								
7451 STD Philanthropic Research, Inc. 1730 Pennsylvania Avenue, Northwest Suite 250 Washington, DC 20006 To support continued free public services, such as the Exchange Program, and institute new technology upgrades	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
Total for Civic Engagement Budget	\$75,000	\$36,750	\$111,750	\$0	\$0	\$0	\$0	\$0
Opportunity Fund Budget								
06 STD SEOs for Cities NFP 177 North State Street, Suite 500 Chicago, IL 60601 To expand the reach, elevate the message and support urban leaders to move from insight to action on the Talent Dividend.	\$70,000	\$0	\$0	\$0	\$0	\$0	\$0	\$70,000
6959 STD Council for Adult and Experiential Learning 55 East Monroe Suite 1930 Chicago, IL 60603 To implement a pilot for a virtual Prior Learning Assessment Center.	\$200,000	\$0	\$200,000	\$0	\$0	\$0	\$0	\$0
7003 STD Manufacturing Institute, The 1331 Pennsylvania Avenue, Northwest Suite 600 Washington, DC 20004 To support Indiana joining the NAM-Endorsed Manufacturing Skills Certification System.	\$100,000	\$0	\$100,000	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011

Grants

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Opportunity Fund Budget								
7080 STD Manufacturing Institute, The 1331 Pennsylvania Avenue, Northwest Suite 600 Washington, DC 20004 To accelerate efforts to align educational pathways with the NAM-Endorsed Manufacturing Skills Certification System in 12 states.	\$450,000	\$0	\$0	\$0	\$0	\$0	\$0	\$450,000
7112 STD National League of Cities Institute 1301 Pennsylvania Avenue Northwest Washington, DC 20004 To disseminate information on how cities can advance a postsecondary success agenda, use learning strategies to connect leading-edge cities with one another and provide technical assistance.	\$100,000	\$0	\$100,000	\$0	\$0	\$0	\$0	\$0
7083 STD Research Foundation of State University of New York, The Sponsored Programs Office 22 Corporate Woods, 3rd Floor, SUNY Plaza Albany, NY 12246 To partner with regional business and industry leaders to create a statewide cooperative education model to help SUNY students complete their degrees.	\$450,000	\$0	\$0	\$0	\$0	\$0	\$0	\$450,000
7494 STD American Association of State Colleges and Universities 1307 New York Avenue, NW Fifth Floor Washington, DC 20005-4701 To explore use of the Degree Qualifications Profile to measure and improve student learning at four-year comprehensive institutions.	\$0	\$414,900	\$364,900	\$0	\$0	\$0	\$0	\$50,000

Annual Report Financial Information - 2011
Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Opportunity Fund Budget								
6782 STD American Legislative Exchange Council 1101 Vermont Avenue, Northwest 11th Floor Washington, DC 20005 To help state legislators explore policy options intended to increase student success and productivity within American higher education.	\$45,000	\$0	\$45,000	\$0	\$0	\$0	\$0	\$0
7306 STD Aspen Institute, The One Dupont Circle, Northwest Suite 700 Washington, DC 20036-1133 To support the design and launch of the Aspen Prize for Community College Excellence.	\$0	\$1,000,000	\$500,000	\$0	\$0	\$0	\$0	\$500,000
7454 STD Aspen Institute, The One Dupont Circle, Northwest Suite 700 Washington, DC 20036-1133 To develop and strengthen relationships between community colleges and employers so that education and training is more aligned to the labor market needs.	\$0	\$250,000	\$250,000	\$0	\$0	\$0	\$0	\$0
7628 STD Board of Control for Southern Regional Education, The 592 Tenth Street, Northwest Atlanta, GA 30318-5790 To assist states and systems in developing and implementing policies with potential to help educate many more students.	\$0	\$486,000	\$400,000	\$0	\$0	\$0	\$0	\$86,000
7028 STD Brookings Institution, The 1775 Massachusetts Ave., N.W. Washington, DC 20036-2188 To improve public-institution and state financial aid policies by making them more effective for low-income students.	\$55,000	\$0	\$55,000	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011

Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Opportunity Fund Budget								
7402 STD Campaign for College Opportunity 900 Wilshire Boulevard, Suite 924 Los Angeles, CA 90017 To improve college access and success in California's community colleges and universities by setting goals and priorities for increased educational attainment and implementation of new student transfer rules among public colleges and universities.	\$0	\$350,000	\$350,000	\$0	\$0	\$0	\$0	\$0
6971 STD Carnegie Foundation for the Advancement of Teaching, The Vista Lane Stanford, CA 94305-8703 To support the creation, implementation and continuous improvement of two new mathematical pathways, Mathway and Statway, to address the high failure rate of developmental mathematics students, particularly in community colleges.	\$200,000	\$0	\$200,000	\$0	\$0	\$0	\$0	\$0
7171 STD Center of Workforce Innovation, Inc., The 2804 Boilemaker Court, Suite E Valparaiso, IN 46383 To develop a scalable model for an accelerated dual credit project to increase college attainment for more students.	\$0	\$50,000	\$50,000	\$0	\$0	\$0	\$0	\$0
7884 STD Central Indiana Corporate Partnership Foundation 111 Monument Circle, Suite 1800 Indianapolis, IN 46204 To support the development of an Advanced Manufacturing and Logistics (AML) curriculum.	\$0	\$50,000	\$50,000	\$0	\$0	\$0	\$0	\$0
7469 STD Association of American Colleges and Universities 1818 R Street, Northwest Washington, DC 20009 To assess the Degree Qualifications Profile competencies in the context of student transfer	\$0	\$2,195,100	\$2,000,000	\$0	\$0	\$0	\$0	\$195,100

Annual Report Financial Information - 2011
Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Opportunity Fund Budget								
7417 STD Editorial Projects in Education 6935 Arlington Road, Suite 100 Bethesda, MD 20814 To provide news coverage of K-16 education alignment issues.	\$0	\$475,000	\$375,000	\$0	\$0	\$0	\$0	\$100,000
7347 STD Education Sector, The 1201 Connecticut Avenue, Northwest Suite 850 Washington, DC 20036 To explore, research and promote adoption of innovative public policy and practice around how higher education is organized and delivered to graduate greater numbers of 21st century students.	\$0	\$600,000	\$500,000	\$0	\$0	\$0	\$0	\$100,000
7108 STD Education Trust, Inc., The 1250 H Street Northwest Suite 700 Washington, DC 20005-5935 To support the next phase of the Access to Success initiative and to advance the higher education advocacy of The Education Trust.	\$387,400	\$0	\$387,400	\$0	\$0	\$0	\$0	\$0
7404 STD Education Writers Association One Dupont Circle Suite 818 Washington, DC 20036 To educate and train a national community of journalists covering higher education issues critical to achieving the Big Goal in an effort to build public will for change.	\$0	\$420,000	\$320,000	\$0	\$0	\$0	\$0	\$100,000
6662 STD Excelencia in Education, Inc. 1717 N Street, Northwest 2nd Floor Washington, DC 20036 To advance policy and engagement strategies to accelerate Latino college degree completion.	\$100,000	\$0	\$100,000	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011

Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Opportunity Fund Budget								
7320 STD Foundation for California Community Colleges 1102 Q Street, Suite 3500 Sacramento, CA 95811 To support the Student Success and Completion Task Force.	\$0	\$200,000	\$200,000	\$0	\$0	\$0	\$0	\$0
7319 STD Institute for Higher Education Policy 1320 19th Street, Northwest Suite 400 Washington, DC 20036 To expand the What We Know online research resource and institute Policy-to-Research Summits to facilitate the application of research for policymaking around the college completion agenda.	\$0	\$1,446,900	\$746,900	\$0	\$0	\$0	\$0	\$700,000
7613 STD Links Foundation, Incorporated, The 1200 Massachusetts Avenue NorthWest Washington, DC 20005 To increase the number of community college students who transfer to and graduate from Historically Black Colleges and Universities.	\$0	\$149,400	\$149,400	\$0	\$0	\$0	\$0	\$0
6915 STD Minnesota Public Radio dba American Public Media 480 Cedar Street St. Paul, MN 55101 To examine critical higher education issues related to the kind of education Americans will need for the 21st Century in public radio- and Web-based documentanes and shorter newsmagazine stories and podcasts.	\$100,000	\$0	\$100,000	\$0	\$0	\$0	\$0	\$0
6860 STD National Center for Higher Education Management Systems 3035 Center Green Drive Suite 150 Boulder, CO 80301-2251 To support the improvement of data resources for higher education stakeholders and contribute to the college completion agenda	\$116,900	\$0	\$58,450	\$0	\$0	\$0	\$0	\$58,450

Annual Report Financial Information - 2011
Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Opportunity Fund Budget								
7376 STD National Conference of State Legislatures 7700 East First Place Denver, CO 80230-7143 To support state legislators in the design and implementation of policies that increase degree attainment with available resources while preserving access and quality.	\$0	\$442,200	\$342,000	\$0	\$0	\$0	\$0	\$100,200
7312 STD New America Foundation 1899 L Street NW Fourth Floor Washington, DC 20036 To create a Postsecondary National Policy Institute for congressional staff	\$0	\$300,000	\$300,000	\$0	\$0	\$0	\$0	\$0
7143 STD Rockefeller Philanthropy Advisors, Inc. 6 West 48th Street, 10th Floor New York, NY 10036 To establish an independent Citizen's Commission in California to recommend statewide postsecondary education attainment goals and strategies to achieve them.	\$50,000	\$0	\$50,000	\$0	\$0	\$0	\$0	\$0
7690 STD Southern University System Foundation, The P.O. Box 2468 Baton Rouge, LA 70821 To increase the number of African American Males with bachelor degrees.	\$0	\$50,000	\$50,000	\$0	\$0	\$0	\$0	\$0
7395 STD Teachers College of Columbia University 525 West 120th Street Box 127 New York, NY 10027 To produce and broker in-depth national and regional education coverage that builds public will for increasing degree attainment by focusing on issues that are underreported by mainstream news organizations	\$0	\$300,000	\$300,000	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Grants**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Opportunity Fund Budget								
6929 STD Tennessee Board of Regents 1415 Murfreesboro Road, Suite 350 Nashville, TN 37217-2833 To increase completion rates for sub-baccalaureate programs in Tennessee while building enrollment and expanding the scope and scale of these programs.	\$300,000	\$0	\$200,000	\$0	\$0	\$0	\$0	\$100,000
6309 STD Trustees of the University of Pennsylvania Office of Research Services 3451 Walnut Street Room P-221 Philadelphia, PA 19104 To highlight models of success at Minority Serving Institutions that illustrate institutional commitment to educating students from low-income, underrepresented groups and increasing national rates of degree attainment.	\$150,000	\$0	\$100,000	\$0	\$0	\$0	\$0	\$50,000
7364 STD United Negro College Fund, Inc. 8260 Willow Oaks Corporate Drive PO Box 10444 Fairfax, VA 22031-8044 To support strategic planning to improve the operation and performance of the United Negro College Fund	\$0	\$200,000	\$200,000	\$0	\$0	\$0	\$0	\$0
7381 STD University of South Florida Board of Trustees, a public body corporate 4202 East Fowler Avenue Tampa, FL 33620 To promote and build awareness and understanding of GOAL 2025 in Florida through periodic public radio news stories on issues and activities that will reach more than 1 million weekly listeners.	\$0	\$358,000	\$358,000	\$0	\$0	\$0	\$0	\$0
Total for Opportunity Fund Budget	\$2,874,300	\$9,737,500	\$9,502,050	\$0	\$0	\$0	\$0	\$3,109,750

Annual Report Financial Information - 2011
Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Preparation Budget								
7221 STD Achieve, Inc. 1400 16th Street NW, Suite 510 Washington, DC 20036 To support the engagement of higher education in the development and use of college and career readiness assessments tied to the Common Core State Standards.	\$399,400	\$0	\$200,000	\$0	\$0	\$0	\$0	\$199,400
7357 STD American Association of State Colleges and Universities 1307 New York Avenue, NW 10th Floor Washington, DC 20005-4701 To support the work of the College Readiness Partnership between the American Association of State Colleges and Universities, Council of Chief State School Officers and State Higher Education Executive Officers.	\$0	\$212,000	\$162,000	\$0	\$0	\$0	\$0	\$50,000
7609 STD America's Promise Alliance 1110 Vermont Avenue Suite 900 Washington, DC 20005 To support the Grad Nation Summit and the Grad Nation Action Collaborative	\$0	\$200,000	\$150,000	\$0	\$0	\$0	\$0	\$50,000
7617 STD Brookings Institution, The 1775 Massachusetts Ave., N.W. Washington, DC 20036-2188 To investigate the costs of state assessments including the costs associated with adopting Common Core Assessments by states.	\$0	\$200,000	\$150,000	\$0	\$0	\$0	\$0	\$50,000

Annual Report Financial Information - 2011

Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Preparation Budget								
7588 STD Center for Law and Social Policy 1200 18th Street, Northwest Suite 200 Washington, DC 20036 To gain a better understanding of the interaction between financial aid and benefit programs, and identifying policy opportunities at both the state and federal levels	\$0	\$355,000	\$305,000	\$0	\$0	\$0	\$0	\$50,000
7591 STD Center for Law and Social Policy 1200 18th Street, Northwest Suite 200 Washington, DC 20036 To serve as intermediary for a three-year initiative to test operational and financing models for integrating benefits access services in community colleges.	\$0	\$1,500,000	\$1,200,000	\$0	\$0	\$0	\$0	\$300,000
7120 STD Center on Education Policy 1001 Connecticut Avenue, NW Suite 522 Washington, DC 20036 To determine how exit examinations affect students' opportunities to receive a high school diploma and experience success in education beyond high school.	\$25,000	\$0	\$25,000	\$0	\$0	\$0	\$0	\$0
7622 STD College Entrance Examination Board, The 45 Columbus Avenue New York, NY 10023-6917 To research reform of the federal Pell Grant Program to ensure sustainable and adequate need-based funding.	\$0	\$73,000	\$73,000	\$0	\$0	\$0	\$0	\$0
5980 STD National Council of the Young Men's Christian Associations of the USA 101 North Wacker Drive Chicago, IL 60606 To manage, expand and integrate the College Goal SundaySM program into the national YMCA movement.	\$1,000,000	\$0	\$1,000,000	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011

Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Preparation Budget								
7659 STD Council for Opportunity in Education Lawrence Building Roehampton University Roehampton Lane London, SW 15 5PJ UNITED KINGDOM To plan the first in a series of Student and World Congresses on international student access to higher education	\$0	\$100,000	\$100,000	\$0	\$0	\$0	\$0	\$0
7586 STD Council of Chief State School Officers One Massachusetts Avenue, NW Suite 700 Washington, DC 20001-1431 To secure staff/consultant capacity for the Smarter Balanced Assessment Consortium to develop strategies and activities to engage higher education institutions and leaders in the Consortium's member states.	\$0	\$300,000	\$250,000	\$0	\$0	\$0	\$0	\$50,000
7476 STD Education Trust, Inc., The 1250 H Street Northwest Suite 700 Washington, DC 20005-5935 To organize and conduct an annual college application week to increase the number of first generation and low-income students that apply for admission and enroll in a postsecondary education certificate or degree program.	\$0	\$56,800	\$56,800	\$0	\$0	\$0	\$0	\$0
7089 STD Indiana Association of United Ways 3901 North Meridian Street, Suite 306 Indianapolis, IN 46208 To integrate college access training and KnowHow2Go concepts into after school and out of school time programs.	\$75,000	\$0	\$37,500	\$0	\$0	\$0	\$0	\$37,500

Annual Report Financial Information - 2011

Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Preparation Budget								
7203 STD Institute for College Access and Success, The 405 14th Street, 11th Floor Oakland, CA 94612 To support the Institute for College Access and Success.	\$0	\$350,000	\$220,000	\$0	\$0	\$0	\$0	\$130,000
5952 STD Academy for Educational Development 1825 Connecticut Avenue, NW Washington, DC 20009-5721 To strengthen and sustain the KnowHow2GO ground campaign by providing technical assistance to state partners, involving additional collaborators and organizing an improved learning community for all partners.	\$606,800	\$0	\$0	\$606,800	\$0	\$0	\$0	\$0
5934 STD Advertising Council, Inc. 815 Second Avenue/42nd Street Ninth Floor New York, NY 10017-4503 To support the KnowHow2GO campaign that encourages more low-income students and their families to take the necessary steps toward postsecondary education.	\$278,600	\$0	\$278,600	\$0	\$0	\$0	\$0	\$0
5954 STD American Council on Education One Dupont Circle, NW Washington, DC 20036-1193 To support in 2009-2011 the KnowHow2GO ground and air campaigns with national and local outreach and communication activities.	\$768,300	\$0	\$768,300	\$0	\$0	\$0	\$0	\$0
7636 STD American Council on Education One Dupont Circle, NW Washington, DC 20036-1193 To fund the development and distribution of additional KnowHow2Go communications materials.	\$0	\$55,000	\$55,000	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011

Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Preparation Budget								
6899 STD Association of Independent Kentucky Colleges and Universities 484 Chenault Road Frankfort, KY 40601 To implement the final phase of KnowHow2Go campaign in Kentucky.	\$70,000	\$0	\$70,000	\$0	\$0	\$0	\$0	\$0
6778 STD College Success Foundation 1605 NW Sammamish Road Suite 200 Issaquah, WA 98027 To ensure that all students, particularly low-income, first-generation college-going, minority and youth with special needs view themselves as college worthy and college ready.	\$200,000	\$0	\$200,000	\$0	\$0	\$0	\$0	\$0
7663 STD College Success Foundation 1605 NW Sammamish Road Suite 200 Issaquah, WA 98027 To build capacity and long-term sustainability of the college access system in Washington State.	\$0	\$100,000	\$100,000	\$0	\$0	\$0	\$0	\$0
6781 STD Community Partners 1000 North Alameda Street Suite 240 Los Angeles, CA 90012 To execute Phase II of the KnowHow2GO campaign in Southern California.	\$50,000	\$0	\$50,000	\$0	\$0	\$0	\$0	\$0
7676 STD Community Partners 1000 North Alameda Street Suite 240 Los Angeles, CA 90012 To advance Southern California College Access Network's vision, broaden its impact, and ensure the sustainability by engaging strategic stakeholders in the work.	\$0	\$82,200	\$82,200	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Grants

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Preparation Budget								
7671 STD EducationQuest Foundation, Inc P. O. Box 82505 Lincoln, NE 68501 To support the development and sustainability of the Panhandle P-16 Initiative regional access network.	\$0	\$95,800	\$95,800	\$0	\$0	\$0	\$0	\$0
6724 STD Illinois Student Assistance Commission 1755 Lake Cook Road Deerfield, IL 60015 To fully implement the final phase of the KnowHow2GO campaign in Illinois	\$100,000	\$0	\$100,000	\$0	\$0	\$0	\$0	\$0
7668 STD Illinois Student Assistance Commission 1755 Lake Cook Road Deerfield, IL 60015 To build the statewide coalition and network capacity to engage policymakers, practitioners, and the public in pursuing and achieving Goal 2025.	\$0	\$100,000	\$100,000	\$0	\$0	\$0	\$0	\$0
7669 STD Imagine Fund, The 222 North Chestnut Street Suite 200 Lansing, MI 48933 To support the development of six Local College Access Networks that demonstrate collective community impact based on the Strive civic infrastructure framework.	\$0	\$100,000	\$100,000	\$0	\$0	\$0	\$0	\$0
6908 STD Indiana Commission for Higher Education 101 West Ohio Street, Suite 550 Indianapolis, IN 46204-4254 To help students in Indiana access and complete postsecondary education.	\$100,000	\$0	\$100,000	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Preparation Budget								
7104 STD National College Access Network, Inc. 1001 Connecticut Avenue, NW Suite 632 Washington, DC 20036 To provide technical assistance in network-building to nine KnowHow2GO states	\$32,000	\$0	\$32,000	\$0	\$0	\$0	\$0	\$0
7388 STD National College Access Network, Inc. 1001 Connecticut Avenue, NW Suite 632 Washington, DC 20036 To provide technical support and resources for the KnowHow2GO states.	\$0	\$777,900	\$777,900	\$0	\$0	\$0	\$0	\$0
6346 STD New England Educational Opportunity Association University of Maine EOC & TS Chadbourn Hall Room 318 Room 318 Orono, ME 04469-5713 To develop a sustainable college access network in Connecticut that will support advocacy and policy.	\$46,600	\$0	\$46,600	\$0	\$0	\$0	\$0	\$0
6745 STD Ohio College Access Network 41 South High Street Suite 1650 Columbus, OH 43215 To fund strategic planning, implementation of that plan and re grants for local programs that will elevate Ohio's ranking in degree attainment across the United States.	\$100,000	\$0	\$100,000	\$0	\$0	\$0	\$0	\$0
7674 STD Student Assistance Foundation of Montana 2500 Broadway Helena, MT 59601 To establish the network management systems and policies needed to achieve long-term sustainability and Goal 2025	\$0	\$98,800	\$98,800	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011

Grants

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Preparation Budget								
6343 STD Tennessee Higher Education Commission 404 James Robertson Parkway Suite 1900 Nashville, TN 37243 To develop a sustainable college access network in Tennessee that will support advocacy and policy.	\$25,000	\$0	\$25,000	\$0	\$0	\$0	\$0	\$0
6747 STD University of South Florida Board of Trustees, a public body corporate 4202 East Fowler Avenue SVC 2054 Tampa, FL 33620 To expand the KnowHow2GO program to selected parts of Florida to create a collaborative statewide network to promote policy development.	\$200,000	\$0	\$200,000	\$0	\$0	\$0	\$0	\$0
6949 STD University of South Florida Board of Trustees, a public body corporate 4202 East Fowler Avenue SVC 2054 Tampa, FL 33620 To develop a targeted outreach campaign to serve, engage and incorporate Haitian American communities of South Florida as an integral part of the KnowHow2GO Florida ground, media and network development campaign.	\$50,000	\$0	\$50,000	\$0	\$0	\$0	\$0	\$0
7675 STD University of South Florida Board of Trustees, a public body corporate 4202 East Fowler Avenue SVC 2054 Tampa, FL 33620 To enhance and maintain the sustainability of the Florida College Access Network.	\$0	\$100,000	\$100,000	\$0	\$0	\$0	\$0	\$0
6564 STD What Kids Can Do, Inc. P. O. Box 603252 Providence, RI 02906 To manage Lumina's three-year initiative to link national youth-serving organizations to the KnowHow2GO campaign.	\$290,000	\$0	\$290,000	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011

Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Preparation Budget								
7589 STD Mind Trust, Inc., The 1630 North Meridian Street, Suite 330 Indianapolis, IN 46202 To support the Education Entrepreneur Fellowship program for innovative leaders in education.	\$0	\$250,000	\$200,000	\$0	\$0	\$0	\$0	\$50,000
7361 STD National Center for Higher Education Management Systems 3035 Center Green Drive Suite 150 Boulder, CO 80301-2251 To assist Lumina Foundation, the Partnership for Assessment and Readiness for College and Career, and the Smarter/balanced Assessment Consortia implement their common agenda in ensuring meaningful higher education involvement in the two K-12 assessment consortia.	\$0	\$47,500	\$47,500	\$0	\$0	\$0	\$0	\$0
7637 STD National Council of the Young Men's Christian Associations of the USA 101 North Wacker Drive Chicago, IL 60606 To support the integration of college access and success within the Y-USA's continuum of educational achievement programs and activities.	\$0	\$250,900	\$250,900	\$0	\$0	\$0	\$0	\$0
7726 STD Board of Control for Southern Regional Education, The 592 Tenth Street, Northwest Atlanta, GA 30318-5790 To conceptualize one or more interactive mobile phone applications and youth-generated media that connect first-generation students with information about preparing for college that directly engages them in the process.	\$0	\$200,000	\$100,000	\$0	\$0	\$0	\$0	\$100,000
7749 STD College Forward P.O. Box 142308 Austin, TX 78714 To plan for the development of a new prototype of a financial aid information system that engages students.	\$0	\$200,000	\$100,000	\$0	\$0	\$0	\$0	\$100,000

Annual Report Financial Information - 2011

Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Preparation Budget								
7813 STD Education Policy Improvement Center 720 East 13th Avenue, Suite 203 Eugene, OR 97401 To design, prototype, and test a Transition Management System to help students navigate all levels of the transition into an Open Enrollment Institution.	\$0	\$200,000	\$100,000	\$0	\$0	\$0	\$0	\$100,000
7814 STD EduGuide 321 North Pine Street Lansing, MI 48933 To provide an online and mobile platform that enables college access programs to multiply their reach, contact hours, manpower and collaborative impact in a measurable and scalable way.	\$0	\$155,000	\$100,000	\$0	\$0	\$0	\$0	\$55,000
7745 STD iMentor 30 Broad Street 9th Floor New York, NY 10004 To see students across the country paired with mentors who can provide the support they need to graduate from high school, enroll in college, and be successful in today's workforce.	\$0	\$200,000	\$100,000	\$0	\$0	\$0	\$0	\$100,000
7819 STD San Francisco Education Plan 1550 Bryant Street, Suite 650 San Francisco, CA 94103 To provide all San Francisco public high school students with online access to an interactive college and career platform.	\$0	\$150,900	\$100,000	\$0	\$0	\$0	\$0	\$50,900
7489 STD North Carolina Center for Public Policy Research P.O. Box 430 West Hargett St., Suite 701 Raleigh, NC 27602 To support policy research and recommendations on issues of college affordability, financial aid and college completion in North Carolina	\$0	\$245,300	\$145,000	\$0	\$0	\$0	\$0	\$100,300

Annual Report Financial Information - 2011
Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Preparation Budget								
7699 STD Rockefeller Philanthropy Advisors, Inc. 6 West 48th Street, 10th Floor New York, NY 10036 To support state-level K-12 and postsecondary collaboration and alignment on the design and implementation of the Common Core State Standards and assessments.	\$0	\$1,560,000	\$575,000	\$0	\$0	\$0	\$0	\$985,000
7359 STD United Way Worldwide 701 North Fairfax Street Alexandria, VA 22314 To support a planning grant that develops a national United Way network model for student supports and success	\$0	\$250,000	\$250,000	\$0	\$0	\$0	\$0	\$0
7429 STD University of Chicago, The 5801 South Ellis Avenue Chicago, IL 60637 To review the literature on the role of psycho-social skills and academic behaviors in shaping performance in middle grades, in high school and in the transition to college.	\$0	\$34,700	\$34,700	\$0	\$0	\$0	\$0	\$0
Total for Preparation Budget	\$4,416,700	\$8,600,800	\$9,852,600	\$606,800	\$0	\$0	\$0	\$2,558,100
Productivity Budget								
6477 STD Carnegie Mellon University 400 Forbes Avenue Pittsburgh, PA 15213 To establish a consortium of community colleges, in collaboration with state agencies and national groups, to enact a large-scale process that increases efficiency in the way instruction is developed, delivered and continuously improved.	\$100,000	\$0	\$100,000	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Productivity Budget								
7340 STD Council of Independent Colleges One Dupont Circle, NW Suite 320 Washington, DC 20036-1110 To explore the applicability and usefulness of the Degree Qualifications Profile on independent college campuses.	\$0	\$425,000	\$325,000	\$0	\$0	\$0	\$0	\$100,000
7323 STD Higher Learning Commission of the North Central Association 230 South LaSalle Street, Suite 7-500 Chicago, IL 60604 To explore the applicability and usefulness of the Degree Qualifications Profile through the Open Pathways accreditation affirmation process.	\$0	\$425,000	\$325,000	\$0	\$0	\$0	\$0	\$100,000
7335 STD Western Association of Schools & Colleges 985 Atlantic Avenue, Suite 100 Alameda, CA 94501 To transform WASC's accreditation process to assure clearer standards for graduation rates, levels of learning and degree outcomes using the Degree Profile	\$0	\$1,500,000	\$800,000	\$0	\$0	\$0	\$0	\$700,000
6672 STD Education Conservancy, The 805 Southwest Broadway Suite 1600 Portland, OR 97205 Based on an understanding of the needs of students and the proclivities of institutions, Ed Conservancy seeks to 1) improve consumer search and navigation of college information and 2) establish standards for determining relevant, publicly available information and for encouraging the requisite institutional participation.	\$100,000	\$0	\$100,000	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Grants

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Productivity Budget								
7230 STD Center for American Progress 1333 H Street Northwest, 10th Floor Washington, DC 20005 To create a public policy framework for U S. higher education that draws upon emerging lessons from service-industry science and strengthens the voice of students as consumers.	\$190,000	\$0	\$100,000	\$0	\$0	\$0	\$0	\$90,000
7100 STD Excelsior College 7 Columbia Circle Albany, NY 12203 To explore the potential for a voluntary, interstate agreement to broaden the availability of accredited online degree programs by reducing regulatory barriers while ensuring strong consumer safeguards.	\$50,000	\$0	\$50,000	\$0	\$0	\$0	\$0	\$0
7365 STD Institute for the Study of Knowledge Management in Education 323 Harvard Avenue Half Moon Bay, CA 94019 To improve, manage and draw lessons from an online network for knowledge sharing among higher education leaders and policymakers from Productivity Strategy Lab states.	\$0	\$750,000	\$650,000	\$0	\$0	\$0	\$0	\$100,000
6460 STD Investigative Reporters and Editors, Inc. Missouri School of Journalism 141 Neff Annex Columbia, MO 65211 To increase campus coverage of college completion and productivity issues by training student journalists to report on these topics.	\$50,000	\$0	\$50,000	\$0	\$0	\$0	\$0	\$0
6305 STD Mills College 5000 MacArthur Boulevard Oakland, CA 94613-1301 To advance the understanding of higher education costs and suggest ways to reduce the cost of producing high-quality degrees.	\$52,000	\$0	\$52,000	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Productivity Budget								
6593 STD Public Agenda Foundation, The 6 East 39th Street Ninth Floor New York, NY 10016-0112 To support the productivity agenda by developing a model for faculty and institutional engagement, and supporting policy and public will building to increase productivity in higher education	\$398,100	\$0	\$398,100	\$0	\$0	\$0	\$0	\$0
7355 STD Public Agenda Foundation, The East 39th Street Ninth Floor New York, NY 10016-0112 To increase Public Agenda's capacity to support state-level and institutional Productivity Grant efforts in five additional states	\$0	\$1,100,000	\$900,000	\$0	\$0	\$0	\$0	\$200,000
6638 STD Social Science Research Council, The One Pierrepont Plaza, Suite 1 Brooklyn, NY 11201 To promote affordable and accessible learning opportunities through technological innovations.	\$250,000	\$0	\$250,000	\$0	\$0	\$0	\$0	\$0
7346 STD Teachers College of Columbia University Box 174 525 West 120th Street 439 Thorndike Hall New York, NY 10027-6696 To examine the implementation and effects of performance funding in three states among various types of public colleges and universities.	\$0	\$599,600	\$399,600	\$0	\$0	\$0	\$0	\$200,000

Annual Report Financial Information - 2011

Grants

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Productivity Budget								
7160 STD Tides Center, The P.O. Box 29907 1014 Torney Avenue San Francisco, CA 94129 To support Lumina Foundation's multi-state, multi-year Productivity Grant initiative by managing contracts with states focused on restructuring costs of administrative and academic services to expand capacity to educate college students.	\$0	\$2,608,000	\$1,500,000	\$0	\$0	\$0	\$0	\$1,108,000
7161 STD Tides Center, The P.O. Box 29907 1014 Torney Avenue San Francisco, CA 94129 To support Lumina Foundation's multi-state, multi-year Productivity Grant initiative by managing contracts with states focused on restructuring costs of administrative and academic services to expand capacity to educate college students.	\$0	\$2,445,100	\$1,500,000	\$0	\$0	\$0	\$0	\$945,100
7162 STD Tides Center, The P.O. Box 29907 1014 Torney Avenue San Francisco, CA 94129 To support Lumina Foundation's multi-state, multi-year Productivity Grant initiative by managing contracts with states focused on incentivizing college completion to encourage graduation of many more Americans with high-quality degrees and credentials.	\$0	\$3,096,900	\$1,500,000	\$0	\$0	\$0	\$0	\$1,596,900
6327 STD Western Governors University 4001 South 700 East Suite 700 Salt Lake City, UT 84107-2533 To draw and share lessons arising from a newer, technology-enabled approach that unbundles elements of higher education to offer individualized, self-paced instruction that focuses on helping students meet defined learning outcomes.	\$400,000	\$0	\$400,000	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Grants**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Productivity Budget								
7297 STD Social Program Evaluators & Consultants 615 Griswold Street Suite 1505 Detroit, MI 48226-3992 To evaluate Lumina Foundation's higher education productivity work	\$0	\$2,800,000	\$1,000,000	\$0	\$0	\$0	\$0	\$1,800,000
7461 STD American Historical Association 400 A St. SE Washington, DC 20003 To apply the Tuning process to the discipline of History.	\$0	\$817,200	\$767,200	\$0	\$0	\$0	\$0	\$50,000
7401 STD Institute for Evidence-Based Change, The 2236 Encinitas Boulevard, Suite G Encinitas, CA 92024 To develop and pilot an evaluation for Tuning USA.	\$0	\$184,700	\$184,700	\$0	\$0	\$0	\$0	\$0
7397 STD Midwestern Higher Education Compact 1300 South Second Street Suite 130 Minneapolis, MN 55454-1079 To apply lessons learned from single-state Tuning initiatives to a regional level.	\$0	\$415,000	\$315,000	\$0	\$0	\$0	\$0	\$100,000
7396 STD Utah Board of Regents Board of Regents Building The Gateway 60 South 400 West Salt Lake City, UT 84101-1284 To expand Tuning in the Utah System of Higher Education.	\$0	\$390,000	\$250,000	\$0	\$0	\$0	\$0	\$140,000
Total for Productivity Budget	\$1,590,100	\$17,556,500	\$11,916,600	\$0	\$0	\$0	\$0	\$7,230,000

Annual Report Financial Information - 2011

Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Success Budget								
5698 STD MDRC 16 East 34th Street, Floor 19 New York, NY 10016-4326 To evaluate the implementation and effectiveness of Achieving the Dream Community Colleges Count	\$2,000,250	\$0	\$2,000,250	\$0	\$0	\$0	\$0	\$0
7386 STD Achieving the Dream, Inc 8455 Colesville Road, Suite 900 Silver Spring, MD 20910 To support attainment of degrees and credentials by community college students nationally through Achieving the Dream, Inc.	\$0	\$2,000,000	\$800,000	\$0	\$0	\$0	\$0	\$1,200,000
7328 STD ACT, Inc. 500 ACT Drive P.O. Box 168 Iowa City, IA 52245 Transferred from Grant# 5517 - National Center for Educational Accountability To build state capacity to share data across educational sectors.	\$0	\$200,000	\$200,000	\$0	\$0	\$0	\$0	\$0
7075 STD American Association of Community Colleges One Dupont Circle, NW Suite 410 Washington, DC 20036 To build on programs with proven success to help credential 40 percent of adult learners to enhance employment opportunities in high-demand fields.	\$450,000	\$0	\$0	\$0	\$0	\$0	\$0	\$450,000
7066 STD Board of Control for Southern Regional Education, The 592 Tenth Street, Northwest Atlanta, GA 30318-5790 To establish a regional, and then national portal to provide returning adult learners with the information, resources and services to assist in completing degrees.	\$450,000	\$0	\$0	\$0	\$0	\$0	\$0	\$450,000

Annual Report Financial Information - 2011
Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Success Budget								
7071 STD Board of Regents of the University of Wisconsin System 1738 Van Hise Hall 1220 Linden Drive Madison, WI 53706-1559 To develop a system-wide approach that expands existing Prior Learning Assessment (PLA) activities.	\$350,000	\$0	\$0	\$0	\$0	\$0	\$0	\$350,000
7419 STD Council for Adult and Experiential Learning 55 East Monroe Suite 1930 Chicago, IL 60603 To increase awareness and usage of LearningCounts.org through marketing and communications support.	\$0	\$400,000	\$400,000	\$0	\$0	\$0	\$0	\$0
7478 STD Goodwill Industries International, Inc 15810 Indianola Drive Rockville, MD 20855 To expand Goodwill's Community College Career Collaboration Project.	\$0	\$550,000	\$400,000	\$0	\$0	\$0	\$0	\$150,000
7064 STD Greater Louisville Foundation 614 West Main Street, Suite 6000 Louisville, KY 40202 To create a model employee degree completion delivery system in the Greater Louisville region.	\$450,000	\$0	\$0	\$0	\$0	\$0	\$0	\$450,000
7013 STD Institute for Higher Education Policy 1320 19th Street, Northwest Suite 400 Washington, DC 20036 To support the expansion of Project Win-Win, helping institutions to award associate degrees to students who have earned them.	\$200,000	\$0	\$100,000	\$0	\$0	\$0	\$0	\$100,000

Annual Report Financial Information - 2011
Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Success Budget								
7491 STD Institute for Higher Education Policy 1320 19th Street, Northwest Suite 400 Washington, DC 20036 To support the expansion of Project Win-Win, helping institutions to award associate degrees to students who have earned them	\$0	\$449,400	\$449,400	\$0	\$0	\$0	\$0	\$0
7068 STD Ivy Tech Foundation 50 West Fall Creek Parkway North Drive Indianapolis, IN 46208 To re-enroll former students who left Ivy Tech College with at least 45 credits and help them complete their associate degrees and go on to pursue baccalaureate programs at the regional campuses of Indiana University.	\$434,200	\$0	\$0	\$0	\$0	\$0	\$0	\$434,200
7074 STD Jobs for the Future, Inc. 88 Broad Street Eighth Floor Boston, MA 02110 To advance a state policy framework in three states to increase adult completion rates in community college occupational/technical credential programs.	\$450,000	\$0	\$0	\$0	\$0	\$0	\$0	\$450,000
7067 STD Minnesota State Colleges and Universities Foundation Wells Fargo Place 700 Seventh Street East, Suite 350 St. Paul, MN 55101 To strengthen the RAPID Completion Program.	\$450,000	\$0	\$0	\$0	\$0	\$0	\$0	\$450,000
7073 STD Philadelphia Workforce Investment Board 1601 Market Street, Suite 1500 Philadelphia, PA 19103 To expand the Graduate! model and replicate it in at least three more regions.	\$450,000	\$0	\$0	\$0	\$0	\$0	\$0	\$450,000

Annual Report Financial Information - 2011

Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Success Budget								
7057 STD Rutgers University Foundation Office of Corporate and Foundation Relations Winants Hall, 7 College Avenue New Brunswick, NJ 08901 To help adults with some degree credits finish their degrees online through the state workforce development system	\$449,700	\$0	\$0	\$0	\$0	\$0	\$0	\$449,700
7070 STD West Virginia Higher Education Policy Commission 1018 Kanawha Boulevard East, Suite 700 Charleston, WV 25301 To create a statewide program to increase associate and bachelor degree completion among adults with prior college credits.	\$448,400	\$0	\$0	\$0	\$0	\$0	\$0	\$448,400
7202 STD Western Interstate Commission for Higher Education 3035 Center Green Drive Suite 200 Boulder, CO 80301-2204 To serve as intermediary organization for Lumina's Adult Degree Completion program to provide a mechanism for effective networking, communication, and dissemination.	\$700,000	\$0	\$100,000	\$0	\$0	\$0	\$0	\$600,000
7458 STD American Institutes for Research 1000 Thomas Jefferson Street, NW Washington, DC 20007 To increase public access to measures of the labor market success of college graduates by program and by campus.	\$0	\$500,000	\$450,000	\$0	\$0	\$0	\$0	\$50,000
7486 STD United Way of Central Indiana, Inc. P. O. Box 88409 3901 North Meridian Street Indianapolis, IN 46208-0409 To increase the number of foster youth who complete high school and pursue higher education.	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011

Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Success Budget								
7393 STD Center for American Progress 1333 H Street Northwest, 10th Floor Washington, DC 20005 To inform students and the public at large on issues of higher education and to promote positive policy outcomes pertaining to student access and success.	\$0	\$50,000	\$50,000	\$0	\$0	\$0	\$0	\$0
6480 STD Complete College America, Inc. 25 East Pine Street Zionsville, IN 46077 To support the creation and mission of the National Consortium on College Completion.	\$200,000	\$0	\$200,000	\$0	\$0	\$0	\$0	\$0
7325 STD Complete College America, Inc. 25 East Pine Street Zionsville, IN 46077 To provide technical assistance to state consortia to assist in the development of strong Community College and Career Training Grant (C3TG) applications.	\$0	\$200,000	\$200,000	\$0	\$0	\$0	\$0	\$0
7485 STD Education Commission of the States 700 Broadway, Suite 810 Denver, CO 80203 To move the states from information sharing and networking to the adoption of proven statewide remedial education policy and practice reforms.	\$0	\$500,000	\$500,000	\$0	\$0	\$0	\$0	\$0
6006 STD Georgetown University 37th & O Streets, Northwest Box 571168 Washington, DC 20057 To conduct and disseminate research on the relationship between higher education and the economy, including projecting the supply and demand for college-educated workers.	\$515,535	\$0	\$515,535	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Success Budget								
6932 STD Indiana Community Action Association, Inc. 1845 West 18th Street Indianapolis, IN 46202 To examine the definition, role, and policy barriers for certificates in IN and nationally, including eligibilty for financial aid and utility in obtaining additional academic credentials	\$30,000	\$0	\$30,000	\$0	\$0	\$0	\$0	\$0
6597 STD Institute for Higher Education Policy 1320 19th Street, Northwest Suite 400 Washington, DC 20036 To strengthen access and success through research, policy and improved practice.	\$310,600	\$0	\$310,600	\$0	\$0	\$0	\$0	\$0
6267 STD Ivy Tech Foundation 50 West Fall Creek Parkway, North Drive Indianapolis, IN 46208-5752 To increase attainment rates of at-risk youth through an Accelerated Associate Degree Program.	\$540,000	\$0	\$400,000	\$0	\$0	\$0	\$0	\$140,000
7542 STD Armstrong Atlantic State University Foundation, Inc. 11935 Abercorn Street Savannah, GA 31419-1997 To double the number of Hispanic and Latino Students attending college from Southeast Georgia.	\$0	\$600,000	\$50,000	\$0	\$0	\$0	\$0	\$550,000
7553 STD Hispanic Federation, Inc. 55 Exchange Place 5th floor New York, NY 10005 To increase the academic success and graduation rates of Latino students in targeted CUNY colleges.	\$0	\$600,000	\$50,000	\$0	\$0	\$0	\$0	\$550,000

Annual Report Financial Information - 2011

Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Success Budget								
7547 STD Hispanics in Philanthropy 55 Second Street Suite 1500 San Francisco, CA 94105 To increase postsecondary access and success rates for Latinos.	\$0	\$600,000	\$50,000	\$0	\$0	\$0	\$0	\$550,000
7512 STD Kentucky Community and Technical College System 470 Cooper Drive Lexington, KY 40506 To increase the number of Latino students earning high quality postsecondary degrees and credentials by engaging in culturally relevant college access and success efforts for students and families in Lexington and Louisville communities in Kentucky.	\$0	\$600,000	\$50,000	\$0	\$0	\$0	\$0	\$550,000
7581 STD Long Beach Community College District 4901 E. Carson Street Long Beach, CA 90808 To provide support for the Promise Pathway, a Latino Student Success Program.	\$0	\$600,000	\$50,000	\$0	\$0	\$0	\$0	\$550,000
7551 STD Maricopa County Community College District 1202 W. Thomas Rd. Phoenix, AZ 85013 To support efforts by Phoenix College to increase the number of Latino students earning high quality postsecondary degrees and credentials by strengthening seamless pathways to college and tracking educational and career success of high need youth in the greater Phoenix metropolitan area of Arizona.	\$0	\$600,000	\$50,000	\$0	\$0	\$0	\$0	\$550,000
7577 STD Miami Dade College 300 Northeast Second Avenue Miami, FL 33132 To increase Latino degree and credential attainment and close the achievement gap	\$0	\$600,000	\$50,000	\$0	\$0	\$0	\$0	\$550,000

Annual Report Financial Information - 2011

Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Success Budget								
7550 STD Rancho Santiago Community College District 1530 West 17th Street Santa Ana, CA 92706 To increase the number of Latino students earning high quality postsecondary degrees and credentials by creating guaranteed admissions pathways for students in Santa Ana, California.	\$0	\$600,000	\$50,000	\$0	\$0	\$0	\$0	\$550,000
7517 STD Regents of the University of New Mexico MSC01 1247 University of New Mexico Albuquerque, NM 87131 To increase the number of Latino students earning high quality postsecondary degrees and credentials by expanding support services and seamless transitions from high school to college for students in Albuquerque and surrounding communities in New Mexico.	\$0	\$600,000	\$50,000	\$0	\$0	\$0	\$0	\$550,000
7558 STD San Antonio Education Fund 131 El Paso Street San Antonio, TX 78204 To increase the number of Latino students earning high quality postsecondary degrees and credentials by expanding financial aid programs and seamless college transitions for students in San Antonio and surrounding counties in Texas.	\$0	\$600,000	\$50,000	\$0	\$0	\$0	\$0	\$550,000
7501 STD Southwest Texas Junior College 2401 Garner Field Road Uvalde, TX 78801 To increase the number of first-generation low-income Latino students achieving college success	\$0	\$600,000	\$50,000	\$0	\$0	\$0	\$0	\$550,000

Annual Report Financial Information - 2011

Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Success Budget								
7563 STD Tennessee Higher Education Commission 404 James Robertson Parkway Suite 1900 Nashville, TN 37243 To expand Tennessee's College Mentor Corps to Memphis to serve Latino high school and community college students with college preparation, access and success services.	\$0	\$600,000	\$50,000	\$0	\$0	\$0	\$0	\$550,000
7394 STD Mobilizing Americas Youth, Inc. 875 K Street, Northwest 8th Floor Washington, DC 20006 To improve educational attainment rates for community college students.	\$0	\$50,000	\$50,000	\$0	\$0	\$0	\$0	\$0
6465 STD American Indian Higher Education Consortium 121 Oronoco Street Alexandria, VA 22314 To assist Tribal Colleges and Universities to become more effectively engaged in higher education policy at the local, state and national level.	\$200,000	\$0	\$200,000	\$0	\$0	\$0	\$0	\$0
6408 STD Florida International University Office of Sponsored Research Administration 11200 Southwest 8th Street (MARC 430) Miami, FL 33199 To evaluate student success initiatives and develop program improvements to raise undergraduate persistence rates using a data-driven inquiry process.	\$195,800	\$0	\$195,800	\$0	\$0	\$0	\$0	\$0
6457 STD Institute for Higher Education Policy 1320 19th Street, Northwest Suite 400 Washington, DC 20036 To provide support to the MSI-Models of Success Program.	\$300,000	\$0	\$300,000	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011

Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Success Budget								
7239 STD Institute for Higher Education Policy 1320 19th Street, Northwest Suite 400 Washington, DC 20036 To provide support to the MSI-Models of Success Program by adding a communications firm to support grantee communications efforts.	\$150,000	\$0	\$0	\$0	\$0	\$0	\$0	\$150,000
7487 STD Institute for Higher Education Policy 1320 19th Street, Northwest Suite 400 Washington, DC 20036 To provide support to the MSI-Models of Success Program	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
6461 STD Jackson State College Development Foundation, Inc. P.O. Box 17144 Jackson, MS 39217 To create a multi-state, peer-learning network to ensure postsecondary success for minority students.	\$187,000	\$0	\$187,000	\$0	\$0	\$0	\$0	\$0
6412 STD Salish Kootenai College, Inc Box 70 Pablo, MT 59855 To identify factors that improve the postsecondary retention and success of American Indian students enrolled in developmental studies courses	\$198,800	\$0	\$198,800	\$0	\$0	\$0	\$0	\$0
6378 STD Southern Education Foundation, Inc. 135 Auburn Avenue, Northeast Second Floor Atlanta, GA 30303 To enhance student learning outcomes assessment, documentation and use at Historically Black Colleges and Universities and Hispanic Serving Institutions.	\$200,000	\$0	\$200,000	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011

Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Success Budget								
6400 STD University Corporation at Monterey Bay 100 Campus Center Seaside, CA 93955-8001 To improve the effectiveness of developmental education courses at three Hispanic-serving institutions.	\$200,000	\$0	\$200,000	\$0	\$0	\$0	\$0	\$0
6417 STD University of North Carolina - General Administration P.O. Box 2688 910 Raleigh Road Chapel Hill, NC 27515-2688 To increase the retention and graduation rates for students of color at all six minority-serving institutions within the University of North Carolina system	\$200,000	\$0	\$200,000	\$0	\$0	\$0	\$0	\$0
6462 STD University of Texas at El Paso 500 West University Avenue Kelly Hall 7th floor El Paso, TX 79968 To identify the institutional structures at minority-serving institutions that foster student success and increase the effectiveness of transfer programs across the state.	\$200,000	\$0	\$200,000	\$0	\$0	\$0	\$0	\$0
6787 STD Urban Institute, The 2100 M Street, Northwest Washington, DC 20037 To conduct a multi-year process and summative evaluation of Lumina's MSI- Models of Success Program.	\$199,800	\$0	\$0	\$199,800	\$0	\$0	\$0	\$0
7468 STD National Skills Coalition 1730 Rhode Island Northwest, Suite 712 Washington, DC 20036 To develop and launch a new national Workforce Data Quality Campaign.	\$0	\$300,000	\$300,000	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011

Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Success Budget								
7498 STD National Student Clearinghouse 2300 Dulles Station Boulevard Suite 300 Herndon, VA 20171 To enhance student level data to better track postsecondary education outcomes, and concurrent enrollments.	\$0	\$544,300	\$500,000	\$0	\$0	\$0	\$0	\$44,300
6260 STD Organisation for Economic Cooperation and Development 2, rue Andre-Pascal F-75775 Paris Cedix, 16 FRANCE To assess the feasibility of cross-national comparisons of higher education learning outcomes.	\$250,000	\$0	\$250,000	\$0	\$0	\$0	\$0	\$0
6531 STD Scholarship America 1550 American Boulevard East Suite 155 Minneapolis, MN 55425-1197 To build the capacity of Scholarship America to operate the Dreamkeepers program.	\$50,000	\$0	\$50,000	\$0	\$0	\$0	\$0	\$0
7208 STD Institute for Evidence-Based Change, The 2236 Encinitas Boulevard, Suite G Encinitas, CA 92024 To assist in the facilitation, management and expansion of Tuning USA.	\$275,000	\$0	\$200,000	\$0	\$0	\$0	\$0	\$75,000
7209 STD Kentucky Council on Postsecondary Education 1024 Capital Center Drive Suite 320 Frankfort, KY 40601 To participate in Tuning USA.	\$25,000	\$0	\$25,000	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Grants

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Success Budget								
7370 STD	\$0	\$450,000	\$400,000	\$0	\$0	\$0	\$0	\$50,000
University of Texas at Austin, The								
3316 Grandview								
Austin, TX 78705								
To identify and promote high-impact practices in community colleges.								
Total for Success Budget	\$11,710,085	\$13,408,700	\$11,377,385	\$199,800	\$0	\$0	\$0	\$13,541,600
Total for Standard Grants	\$23,333,185	\$49,340,250	\$44,727,385	\$1,006,600	\$0	\$0	\$0	\$26,939,450

Annual Report Financial Information - 2011

Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Productivity Budget								
6925 STD CommunicationWorks, LLC 1752 N Street, Northwest, 6th Floor Washington, DC 20036 To develop communications activities and products that strengthen the ability of states to graduate more students within existing resources while maintaining academic quality.	\$200,000	\$0	\$0	\$0	\$0	\$0	\$0	\$200,000
7043 STD HCM Strategists, LLC 1156 15th Street, Northwest Washington, DC 20005 To manage state contracts and coordinate technical support for Lumina's productivity initiative.	\$2,502,200	\$0	\$776,200	\$0	\$0	\$0	\$0	\$1,726,000
Total for Productivity Budget	\$2,702,200	\$0	\$776,200	\$0	\$0	\$0	\$0	\$1,926,000
Success Budget								
7457 STD Mathematica Policy Research 600 Maryland Avenue, Southwest Suite 550 Washington, DC 20024 To continue the process and summative evaluation of Lumina's Minority Serving Institutions- Models of Success (MSI-MS) program.	\$0	\$350,000	\$275,000	\$0	\$0	\$0	\$0	\$75,000
Total for Success Budget	\$0	\$350,000	\$275,000	\$0	\$0	\$0	\$0	\$75,000
Total for Expenditure Responsibility Grants	\$2,702,200	\$350,000	\$1,051,200	\$0	\$0	\$0	\$0	\$2,001,000
Grand Total	\$26,035,385	\$49,690,250	\$45,778,585	\$1,006,600	\$0	\$0	\$0	\$28,940,450

**Annual Report Financial Information - 2011
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Directors' Designation								
1002430 STD American Indian College Fund 8333 Greenwood Boulevard Denver, CO 80221 To support the American Indian College Fund	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
1002812 STD Ball State University Foundation 2800 West Bethel Avenue Muncie, IN 47304 To provide for the Freshman Merit Scholarship.	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
1002795 STD Butler University 4600 Sunset Avenue Indianapolis, IN 46208 To provide support for general support.	\$0	\$2,000	\$2,000	\$0	\$0	\$0	\$0	\$0
1002897 STD Butler University 4600 Sunset Avenue Indianapolis, IN 46208 To provide for the Butler Innovation Fund.	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
1002926 STD Cathedral High School 5225 E. 56th Street Indianapolis, IN 46226 To provide scholarships for needy students.	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
1002925 STD Center for Leadership Development, Inc. 2425 Dr. Martin Luther King Jr. Street Indianapolis, IN 46208-5546 To provide general support.	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Special Gifts

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Directors' Designation								
1002790 STD Children's Museum of Indianapolis, Inc. 3000 North Meridian Indianapolis, IN 46208 To provide support for education and other museum initiatives.	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
1002791 STD Christian Theological Seminary, The 1000 West 42nd Street Indianapolis, IN 46208 To provide for the general support.	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
1002924 STD College Mentors for Kids 212 West 10th Street Suite B260 Indianapolis, IN 46202 To provide general operating support.	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
1002794 STD Dyslexia Institute of Indiana, Inc. 8395 Keystone Crossing, Suite 102 Indianapolis, IN 46240 To provide for the general support.	\$0	\$2,000	\$2,000	\$0	\$0	\$0	\$0	\$0
1002811 STD Florida Gulf Coast University Foundation 10501 FGCU Boulevard South Fort Myers, FL 33965-6565 To provide for the First Generation Scholarship Program.	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
1002888 STD Higher Learning Commission 230 South LaSalle Street Suite 7-500 Chicago, IL 60604-1411 To study dual credit and issues impacting regional accreditations.	\$0	\$25,000	\$25,000	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Directors' Designation								
1002431 STD Hispanic College Fund 1301 K Street, Northwest Suite 450A Washington, DC 20005	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
To support the Hispanic College Fund.								
1002953 STD Hispanic Scholarship Fund 55 Second Street Suite 1500 San Francisco, CA 94105	\$0	\$15,000	\$15,000	\$0	\$0	\$0	\$0	\$0
To provide general program support.								
1002954 STD Hispanics in Philanthropy 55 Second Street, Suite 1500 San Francisco, CA 94105	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
To provide general program support.								
1002792 STD Hutson School 7245 East 75th Street Indianapolis, IN 46256	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
To provide for the general support.								
1002552 STD Illinois Institute of Technology Suite 310 565 West Adams Street Chicago, IL 60661	\$0	\$12,500	\$12,500	\$0	\$0	\$0	\$0	\$0
To support the PLUS program for low income students.								
1002555 STD Indiana University Foundation 530 West New York Street Indianapolis, IN 46202	\$0	\$12,500	\$12,500	\$0	\$0	\$0	\$0	\$0
To support enrollment and success of low income students.								

Annual Report Financial Information - 2011
Special Gifts

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Directors' Designation								
1002899 STD Indiana University Foundation P.O. Box 500 Bloomington, IN 47402 To provide general support for the Herron School of Art and Design.	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
1002786 STD International School of Indiana, Inc. 4330 North Michigan Road Indianapolis, IN 46208 To provide for the general support.	\$0	\$2,000	\$2,000	\$0	\$0	\$0	\$0	\$0
1002846 STD Norfolk State University Foundation, Inc. Office of the President 700 Park Avenue Suite 520 Norfolk, VA 23504-8000 To provide for the underprepared student program.	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
1002785 STD Northwestern University 2020 Ridge Avenue, Suite 230 Gift/Record Services Evanston, IL 60208-4305 To support the Medill School of Journalism.	\$0	\$4,000	\$4,000	\$0	\$0	\$0	\$0	\$0
1002955 STD Parents Step Ahead 102 Empire Center Dallas, TX 75235 To provide general program support.	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
1002557 STD Providence Cristo Rey High School 75 North. Belleview Place Indianapolis, IN 46222 To provide scholarship support.	\$0	\$15,000	\$15,000	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Directors' Designation								
1002920 STD Regents of the University of California University of California 1111 Franklin Street Oakland, CA 94607	\$0	\$15,000	\$15,000	\$0	\$0	\$0	\$0	\$0
To be distributed evenly among the 10 campuses in support of the "Project You Can" Scholarships.								
1002645 STD Saint Anselm College 100 St. Anselm Drive, Box 1738 Manchester, NH 03102-1310	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
To support the Abbot Gerald McCarthy, O.S.B. Award scholarship fund.								
1002866 STD St. Joseph's College of Maine 278 White's Bridge Road Standish, ME 04084	\$0	\$25,000	\$25,000	\$0	\$0	\$0	\$0	\$0
To provide for scholarship programs.								
1002793 STD The Mind Trust 407 N. Fulton Street, Suite 102 Indianapolis, IN 46202	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
To provide for the general support.								
1002432 STD United Negro College Fund 8737 North Meridian Street, Suite 203 Indianapolis, IN 46208	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
To give support to the local United Negro College Fund.								
1002919 STD University of California Berkeley Foundation 2080 Addison Street, #4200 Berkeley, CA 94720-4200	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
To support need-based John L. Burris scholarships at UC Berkeley School of Law.								

Annual Report Financial Information - 2011
Special Gifts

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Directors' Designation								
1002593 STD University of Dubuque 2000 University Avenue Dubuque, IA 52001 To support the annual mission and vision fund.	\$0	\$25,000	\$25,000	\$0	\$0	\$0	\$0	\$0
1002921 STD University of Pennsylvania 601 Franklin Building 3451 Walnut Street Philadelphia, PA 19104 To support need-based scholarships at the School of Arts and Sciences.	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
1002843 STD Xavier University of Louisiana 1 Drexel Drive New Orleans, LA 70125-1098 To support the program for underprepared students.	\$0	\$15,000	\$15,000	\$0	\$0	\$0	\$0	\$0
1002845 STD Xavier University Preparatory School Office of Development 5116 Magazine Street New Orleans, LA 70115-1844 To provide support for the underprepared students.	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
Total for Directors' Designation	\$0	\$300,000	\$300,000	\$0	\$0	\$0	\$0	\$0
Length of Service Gift								
02887 STD Alpha Kappa Alpha Educational Advancement Foundation, Inc. 5656 South Stony Island Avenue Chicago, IL 60637 To provide support for scholarships in the Indianapolis area.	\$0	\$500	\$500	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Special Gifts

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Length of Service Gift								
1002623 STD Cats Haven, LTD PO Box 30206 Indianapolis, IN 46230 To support the care and well being of the cats at Cats Haven.	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
1002519 STD CrimeStoppers of Sangamon & Menard Counties, Inc. P.O. Box 1059 Springfield, IL 62705 To provide support where needed without restriction.	\$0	\$500	\$500	\$0	\$0	\$0	\$0	\$0
1002508 STD Dominican Literacy Center, Aurora 260 Vermont Avenue Aurora, IL 60505 To support English literacy training.	\$0	\$500	\$500	\$0	\$0	\$0	\$0	\$0
1002586 STD Friends of Holliday Park 6363 Spring Mill Road Indianapolis, IN 46260 To provide general support.	\$0	\$500	\$500	\$0	\$0	\$0	\$0	\$0
1002962 STD Friendship Missionary Baptist Church 1301 North Goodlet Avenue Indianapolis, IN 46222 To support the Arthur Johnson Scholarship fund.	\$0	\$500	\$500	\$0	\$0	\$0	\$0	\$0
1002472 STD Girls Incorporated of Greater Indianapolis 3935 North Meridian Street Indianapolis, IN 46208-4011 To provide general support.	\$0	\$500	\$500	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Special Gifts

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Length of Service Gift								
1002485 STD Gleaners Food Bank of Indiana, Inc. 3737 Waldemer Avenue Indianapolis, IN 46241 To provide support without restriction.	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
1002474 STD Hey U.G.L.Y P O. Box 345 Rolling Prairie, IN 46371 To help teach children empathy to curb bullying in schools.	\$0	\$500	\$500	\$0	\$0	\$0	\$0	\$0
1002587 STD Morgan County Humane Society 690 W. Mitchell Ave. Martinsville, IN 46151 To provide general support.	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
1002442 STD National Childhood Cancer Foundation 4600 East West Highway, Suite 600 Bethesda, MD 20814 To support childhood cancer research in memory of Coleman Larson. Please send this tribute to Team Larson, P.O. Box 251, Callender, Iowa, 50523.	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
1002455 STD Operation Mend 10945 LeConte Avenue, Suite 3132 Los Angeles, CA 90095 To provide general support.	\$0	\$500	\$500	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Special Gifts

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Length of Service Gift								
1002798 STD Planned Parenthood of Indiana, Inc. 200 South Meridian Street, Suite 400 P.O. Box 397 Indianapolis, IN 46206 To support the Women's Health Fund to assist low-income women with family planning supplies, cancer screenings, sexually transmitted infection testing and treatment, and cervical cancer treatments.	\$0	\$500	\$500	\$0	\$0	\$0	\$0	\$0
1002825 STD Second Missionary Baptist Church 1400 Oak Street Greene Haute, IN 47807 To provide for the new church organ.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002932 STD Stepping Stones, Inc. P.O. Box 1366 Bloomington, IN 47402 To provide for youth experiencing homelessness.	\$0	\$500	\$500	\$0	\$0	\$0	\$0	\$0
1002918 STD Wilberforce University 1055 North Bickett Road Wilberforce, OH 45384-1001 To provide for the Dr. Yvonne Walker-Taylor/AKA endowment fund	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
Total for Length of Service Gift	\$0	\$11,500	\$11,500	\$0	\$0	\$0	\$0	\$0
Working Gift								
1002616 STD Aids Task Force, Inc. 525 Oxford St. Fort Wayne, IN 46806 To improve the quality of life for those with Aids and provide community education.	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002644 STD Alice's, Inc. P.O. Box 124 Valparaiso, IN 46384 To provide for the general support.	\$0	\$450	\$450	\$0	\$0	\$0	\$0	\$0
1002827 STD ALS Association -Wisconsin Chapter 3333 North Mayfair #213 Wauwatosa, WI 53222 To support ALS fund-raising efforts in the Milwaukee Walk to Defeat ALS.	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
1002911 STD Alzheimers Disease and related Disorders Association, Inc 225 North Michigan Aveune 17th floor Chicago, IL 60601-7633 To provide for the general donation.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002551 STD American Cancer Society 17060 Oak Park Avenue Tinley Park, IL 60477 To support Kathy Wellmans participation on the praying for a cure Relay for Life event.	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
1002905 STD American Cancer Society 5635 West 96th Street, Suite 100 Indianapolis, IN 46278 To support breast cancer research in honor of Joan Eaton.	\$0	\$915	\$915	\$0	\$0	\$0	\$0	\$0
1002535 STD American Cancer Society Great Lakes Division, Inc 1755 Abbey Road East Lansing, MI 48823-1907 To provide general operating support.	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Special Gifts

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002725 STD American Cancer Society Great Lakes Division, Inc 1755 Abbey Road East Lansing, MI 48823-1907 To support research for a cancer cure.	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
1002829 STD American Cancer Society Great Lakes Division, Inc 1755 Abbey Road East Lansing, MI 48823-1907 To provide for the general need.	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
1002860 STD American Diabetes Association Inc. 6415 Castleway West Drive Suite 114 Indianapolis, IN 46250 To fund research for a cure to diabetes.	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
1002861 STD American Diabetes Association Inc. 6415 Castleway West Drive Suite 114 Indianapolis, IN 46250 To fund research for a diabetes cure.	\$0	\$153	\$153	\$0	\$0	\$0	\$0	\$0
1002862 STD American Diabetes Association Inc. 6415 Castleway West Drive Suite 114 Indianapolis, IN 46250 To fund research for a diabetes cure.	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
1002871 STD American Diabetes Association Inc. 6415 Castleway West Drive Suite 114 Indianapolis, IN 46250 To support ADA research.	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002872 STD American Diabetes Association Inc. 6415 Castleway West Drive Suite 114 Indianapolis, IN 46250 To support diabetes research.	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
1002510 STD American Heart Association 5375 Southwest 7th Street Topeka, KS 66606 To provide general support in honor of Anna and Emma Clymore's participation in a Jump Rope for Heart event.	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
1002529 STD American Heart Association 5375 Southwest 7th Street Topeka, KS 66606 To sponsor Robbie Morales' participation in Jump for Heart on February 14th and 16th in honor of Cody at Smith Elementary School of Martinsville.	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
1002717 STD American Heart Association 5375 Southwest 7th Street Topeka, KS 66606 To provide support for general programs and research.	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
1002848 STD American Heart Association 5375 Southwest 7th Street Topeka, KS 66606 To support the general program.	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
1002928 STD American Honda Education Corporation 2750 Notiaah Road Estes Park, CO 80517 To provide unrestricted support for Eagle Rock School.	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002452 STD American Indian College Fund 8333 Greenwood Boulevard Denver, CO 80221 To support education access.	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
1002737 STD American Indian College Fund 8333 Greenwood Boulevard Denver, CO 80221 To provide for the scholarship fund.	\$0	\$450	\$450	\$0	\$0	\$0	\$0	\$0
1002582 STD American Jewish University 15600 Mulholland Drive Los Angeles, CA 90077 To support the work of the Ziegler School of Rabbinic Studies at the American Jewish University.	\$0	\$4,500	\$4,500	\$0	\$0	\$0	\$0	\$0
1002669 STD American National Red Cross P.O. Box 37295 Washington, DC 20013 To provide support for communities affected by the earthquake and tsunami in Japan.	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
1002670 STD American National Red Cross P.O. Box 37295 Washington, DC 20013 To provide support for the victims of the Japanese earthquake.	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
1002877 STD American National Red Cross P.O. Box 37295 Washington, DC 20013 To provide assistance in the African drought program.	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Special Gifts

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002501 STD American Red Cross, Greater Houston Chapter 2700 Southwest Freeway Houston, TX 77098 To contribute to the fundraising efforts by Greg Tennessee in the Tour du Rouge bike ride for Red Cross.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002602 STD American University in Bulgaria, The 910 17th Street, Northwest Suite 1100 Washington, DC 20006 To support endowed scholarships.	\$0	\$15,000	\$15,000	\$0	\$0	\$0	\$0	\$0
1002596 STD Amyotrophic Lateral Sclerosis Association 2807 Amsterdam Road Villa Hills, KY 41017 To support the ALS organization and its victims.	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
1002951 STD Amyotrophic Lateral Sclerosis Association 2807 Amsterdam Road Villa Hills, KY 41017 To support ALS research.	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
1002342 STD Arizona Foundation for Women 2828 North Central Avenue, Suite 1200 Phoenix, AZ 85004 To provide support for grant funding and general operations.	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
1002343 STD Arizona Foundation for Women 2828 North Central Avenue, Suite 1200 Phoenix, AZ 85004 To support the 2011 Sandra Day O' Conner Awards Luncheon.	\$0	\$4,500	\$4,500	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011

Special Gifts

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002801 STD Assumption Catholic Church Box 287-207 East 3rd Street Morris, MN 56267 To provide for the general support in memory of Darlene Awsb.	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
1002806 STD Autism Advocates of Indiana P.O. Box 285 Fishers, IN 46038 To support Team Caleb in the 2011 AAI Walk.	\$0	\$120	\$120	\$0	\$0	\$0	\$0	\$0
1002493 STD Avon Products Foundation, Inc. P O Box 1073 Avon Plaza Rye, NY 10580 To provide support for breast cancer.	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
1002980 STD Backstreet Missions, Inc. 215 South Westplex Avenue Bloomington, IN 47404 To support ongoing services for food, clothing, and shelter needs in the Bloomington community.	\$0	\$1,200	\$1,200	\$0	\$0	\$0	\$0	\$0
1002819 STD Ball State University Foundation 2800 West Bethel Avenue Muncie, IN 47304 To provide for the Bold Celebration Scholars.	\$0	\$3,750	\$3,750	\$0	\$0	\$0	\$0	\$0
1002820 STD Ball State University Foundation 2800 West Bethel Avenue Muncie, IN 47304 To provide for the Jim and MaryBeth Lintzenich Freshman Merit Scholarship.	\$0	\$11,250	\$11,250	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002340 STD Banner Health Foundation 2025 N. 3rd Street, Suite 250 Phoenix, AZ 85004 To support the Banner MD Anderson Cancer Center.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002640 STD Banner Health Foundation 2025 N. 3rd Street, Suite 250 Phoenix, AZ 85004 To provide support to the M.D. Anderson Cancer Center.	\$0	\$20,000	\$20,000	\$0	\$0	\$0	\$0	\$0
1002719 STD Bergen Catholic High School 1040 Oradell Avenue Oradell, NJ 07649 To provide for the annual fund.	\$0	\$1,125	\$1,125	\$0	\$0	\$0	\$0	\$0
1002402 STD Big Brothers Big Sisters of Central Indiana, Inc. 2960 N. Meridian Street Suite 150 Indianapolis, IN 46208-4715 For general operations in support of annual giving.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
1002965 STD Big Brothers Big Sisters of Metropolitan Detroit 7700 Second Svenue Suite 602 Detroit, MI 48202 To support the 4th Annual Greck Bowling Challenge.	\$0	\$1,365	\$1,365	\$0	\$0	\$0	\$0	\$0
1002418 STD Bishop Chatard High School 5885 Crittenden Avenue Indianapolis, IN 46220 To provide support for the annual fund.	\$0	\$3,750	\$3,750	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002573 STD Bishop Chatard High School 5885 Crittenden Avenue Indianapolis, IN 46220	\$0	\$37,500	\$37,500	\$0	\$0	\$0	\$0	\$0
To provide support for the capital campaign.								
1002648 STD Blue River Community Foundation 54 W. Broadway, Suite 1 Shelbyville, IN 46176	\$0	\$1,200	\$1,200	\$0	\$0	\$0	\$0	\$0
To provide for the special projects fund that directly benefits the Blue River Career Project HOSA project.								
1002498 STD Boy Scouts of America Council 7125 Fall Creek Road North Indianapolis, IN 46256	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To provide general support.								
1002545 STD Boy Scouts of America Council 7125 Fall Creek Road North Indianapolis, IN 46256	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To provide general operating support.								
1002891 STD Boy Scouts of America Council 7125 Fall Creek Road North Indianapolis, IN 46256	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To provide for the general support.								
1002401 STD Brebeuf Jesuit Preparatory 2801 W. 86th Street Indianapolis, IN 46268-1925	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To provide scholarship support for the Angel Fund.								

**Annual Report Financial Information - 2011
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002938 STD Broward Children's Center, Inc. 200 Southeast 19th Avenue Pompano Beach, FL 33060	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
To provide general support without restriction.								
1002414 STD Butler University 4600 Sunset Avenue Indianapolis, IN 46208	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To support College of Education without restriction.								
1002851 STD Butler University 4600 Sunset Avenue Indianapolis, IN 46208	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To provide scholarships for athletes.								
1002808 STD Campus Crusade for Christ, Inc. 100 Lake Hart Drive Orlando, FL 32832	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To support the general support.								
1002722 STD Cancer Support Community 5150 West 71st Street Indianapolis, IN 46268	\$0	\$600	\$600	\$0	\$0	\$0	\$0	\$0
To support the general need.								
1002838 STD Cancer Support Community of Central Indiana 5150 West 71st Street Indianapolis, IN 46268	\$0	\$1,562	\$1,562	\$0	\$0	\$0	\$0	\$0
To provide for the general support.								

**Annual Report Financial Information - 2011
Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002828 STD Care for Kids Foundation 4760 Kingsway Drive Indianapolis, IN 46205 To provide assistance for at risk foster youth who go to Care for Kids Summer Camp at Bradford Woods.	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
1002499 STD Carmel Clay Education Foundation 5201 East 131st Street Carmel, IN 46033 To provide general support.	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
1002327 STD Castleton United Methodist Nursery School 7101 North Shadeland Indianapolis, IN 46250 To support teacher appreciation.	\$75	\$0	\$75	\$0	\$0	\$0	\$0	\$0
1002359 STD Castleton United Methodist Nursery School 7101 North Shadeland Indianapolis, IN 46250 To support the CUMNS kids endowment fund in honor of Jill Kramer and her service to Lumina Foundation and her community.	\$0	\$1,071	\$1,071	\$0	\$0	\$0	\$0	\$0
1002389 STD Cathedral High School 5225 E. 56th Street Indianapolis, IN 46226 To provide support for scholarship funds.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
1002400 STD Catholic Relief Services P.O. Box 17090 Baltimore, MD 21298 To provide general operating support.	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Special Gifts

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002423 STD Catholic Youth Organization 580 E. Stevens Street Indianapolis, IN 46203 As a memorial contribution to recognize Jim Flanagan	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
1002507 STD CATO Institute 1000 Massachusetts Avenue Washington, DC 20001 To provide general support without restriction.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002856 STD Cats Haven, LTD PO Box 30206 Indianapolis, IN 46230 To support the cats at Cat's Haven.	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
1002456 STD Center for Positive Living 330 South Pineapple Avenue Suite 210 Sarasota, FL 34236 To provide general support.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
1002460 STD Central Indiana Community Foundation 615 N. Alabama Street Room 119 Indianapolis, IN 46204-1498 To support women's causes.	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
1002509 STD Central Indiana Community Foundation 615 N. Alabama Street Room 119 Indianapolis, IN 46204-1498 As a contribution to the endowment to support services for women and children.	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002687 STD Central Indiana Community Foundation 615 N. Alabama Street Room 119 Indianapolis, IN 46204-1498 To provide for the needs of the women and girls.	\$0	\$9,000	\$9,000	\$0	\$0	\$0	\$0	\$0
1002700 STD Central Indiana Community Foundation 615 N Alabama St., Suite 119 Indianapolis, IN 46204 To provide support for the women's fund.	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
1002705 STD Central Indiana Community Foundation 615 N Alabama St., Suite 119 Indianapolis, IN 46204 To provide funds for Latino students scholarships.	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
1002635 STD CG Jung Society of Sarasota Inc. P.O. Box 50611 Sarasota, FL 34232 To provide general support.	\$0	\$450	\$450	\$0	\$0	\$0	\$0	\$0
1002638 STD CG Jung Society of Sarasota Inc. P.O. Box 50611 Sarasota, FL 34232 To provide support to the endowment.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
1002376 STD Child Crisis Center East Valley, Inc. PO Box 4114 Mesa, AZ 85211 To support general operations.	\$0	\$9,000	\$9,000	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Special Gifts

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002748 STD Children's Museum of Indianapolis, Inc. 3000 North Meridian Indianapolis, IN 46208 To provide for the general support.	\$0	\$450	\$450	\$0	\$0	\$0	\$0	\$0
1002815 STD Christ the King Catholic Church 5858 Crittenden Avenue Indianapolis, IN 46220 To provide for the general support in memory of Gracie Bill.	\$0	\$90	\$90	\$0	\$0	\$0	\$0	\$0
1002410 STD Christ United Methodist Church 8540 US 31 South Indianapolis, IN 46227 To provide general operating support. No part of this gift shall be used for pastor salaries or personal benefits.	\$0	\$1,943	\$1,943	\$0	\$0	\$0	\$0	\$0
1002514 STD Christ United Methodist Church 318 North Union Westfield, IN 46074 To provide support for the general operating fund.	\$0	\$1,125	\$1,125	\$0	\$0	\$0	\$0	\$0
1002544 STD Christ United Methodist Church 318 North Union Westfield, IN 46074 To support general operating expenses.	\$0	\$600	\$600	\$0	\$0	\$0	\$0	\$0
1002755 STD Christ United Methodist Church 318 North Union Westfield, IN 46074 To use \$750 for the operating expenses, and \$750 to be used for the building fund.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Special Gifts

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002966 STD Christ United Methodist Church 318 North Union Westfield, IN 46074 To use \$675 for the operating expenses, and \$675 to be used for the building fund.	\$0	\$1,350	\$1,350	\$0	\$0	\$0	\$0	\$0
1002782 STD Christian Foundation for Children and Aging One Elmwood Avenue Kansas City, KS 66103 To provide for the CFCA's Santa Catarina project in Monetary, Mexico, in honor of Yovana Elizabeth Sanchez Mendoza.	\$0	\$1,080	\$1,080	\$0	\$0	\$0	\$0	\$0
1002618 STD Christian Theological Seminary, The 1000 West 42nd Street Indianapolis, IN 46208 To match the Lilly Endowment Challenge.	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
1002673 STD Christian Theological Seminary, The 1000 West 42nd Street Indianapolis, IN 46208 To provide support for the students.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
1002621 STD Church of the Saviour United Methodist Church 6205 Rucker Road Indianapolis, IN 46220 To support the general fund	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
1002604 STD College of William and Mary P.O. Box 1693 Williamsburg, VA 23187-1963 To support the 1st LT. Todd W. Weaver Memorial Award.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002952 STD College Success Foundation 1605 Northwest Sammamish Road Suite 200 Issaquah, WA 98027 To support the Leadership 1000 Scholarship Fund.	\$0	\$3,750	\$3,750	\$0	\$0	\$0	\$0	\$0
1002462 STD Community Foundation of Northern Colorado 4745 Wheaton Drive, Suite 100 Fort Collins, CO 80525 To support the Estes Valley Community Fund Legacy.	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
1002497 STD Compassion International Inc. 12290 Voyager Parkway Colorado Springs, CO 80921 To provide support where most needed.	\$0	\$414	\$414	\$0	\$0	\$0	\$0	\$0
1002627 STD Compassion International Inc. 12290 Voyager Parkway Colorado Springs, CO 80921 To provide general support.	\$0	\$552	\$552	\$0	\$0	\$0	\$0	\$0
1002865 STD Compassion International Inc. 12290 Voyager Parkway Colorado Springs, CO 80921 To provide support as needed.	\$0	\$105	\$105	\$0	\$0	\$0	\$0	\$0
1002745 STD Congregation of Holy Cross, U.S. Province P.O. Box 774 Notre Dame, IN 46556 To provide health care of the elderly religious.	\$0	\$60,000	\$60,000	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002387 STD Conner Prairie Museum, Inc. 13400 Allisonville Road Fishers, IN 46038 To provide general support.	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
1002611 STD Conner Prairie Museum, Inc. 13400 Allisonville Road Fishers, IN 46038 To support Conner Prairie's Civil War Project.	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
1002733 STD Conner Prairie Museum, Inc. 13400 Allisonville Road Fishers, IN 46038 To provide for the general support.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
1002975 STD Conner Prairie Museum, Inc. 13400 Allisonville Road Fishers, IN 46038 To provide general operating support.	\$0	\$8,040	\$8,040	\$0	\$0	\$0	\$0	\$0
1002506 STD Contra Costa Jewish Community Center 2071 Tice Valley Boulevard Walnut Creek, CA 94595 To support cultural arts programming.	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
1002805 STD Contra Costa Jewish Community Center 2071 Tice Valley Boulevard Walnut Creek, CA 94595 To provide support for the Renaissance Fund.	\$0	\$15,000	\$15,000	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002852 STD Contra Costa Jewish Day School 3836 Mount Diablo Boulevard Lafayette, CA 94549 To provide for future building expansion.	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
1002853 STD Contra Costa Jewish Day School 3836 Mount Diablo Boulevard Lafayette, CA 94549 To support the school and help provide more scholarship.	\$0	\$3,750	\$3,750	\$0	\$0	\$0	\$0	\$0
1002855 STD Corona Del Sol High School 908 E. Derby Drive Tempe, AZ 85284 To support the wrestling program.	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
1002879 STD Corona Del Sol High School 1001 East Knox Road Tempe, AZ 85284 To provide support to the choir program.	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
1002634 STD Dance Kaleidoscope, Inc. 4603 Carendon Road, Suite 32 Indianapolis, IN 46208 To provide general support.	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
1002187 STD Dartmouth Hitchcock Medical Center One Medical Center Drive Lebanon, NH 03756 To provide general support.	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002878 STD Dartmouth Hitchcock Medical Center One Medical Center Drive Lebanon, NH 03756 To support the annual fund.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002664 STD DePauw University 300 East Seminary Street P.O. Box 37 Greencastle, IN 46135-0037 To provide for the annual fund.	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
1002753 STD DePauw University 300 East Seminary Street P.O. Box 37 Greencastle, IN 46135-0037 To provide for the general support.	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
1002360 STD Diocese of New Jersey 7th & Central Ave, PO Box 428 Barnegat Light, NJ 08006 To support community outreach.	\$0	\$3,750	\$3,750	\$0	\$0	\$0	\$0	\$0
1002350 STD Diocese of Venice in Florida P.O. Box 2116 Venice, FL 32484 To support the 2010 Catholic Faith Appeal.	\$3,000	\$0	\$3,000	\$0	\$0	\$0	\$0	\$0
1002650 STD Diocese of Venice in Florida P.O. Box 2116 Venice, FL 32484 To support the Christmas Appeal.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002893 STD Diocese of Venice in Florida P.O. Box 2116 Venice, FL 32484 To provide \$2000 for the Christmas Appeal and \$1000 for the general fund.	\$0	\$9,000	\$9,000	\$0	\$0	\$0	\$0	\$0
1002694 STD Drexel University Office of Institutional Advancement 3141 Chestnut Street, Suite 310 Philadelphia, PA 19104 To provide for scholarships.	\$0	\$37,500	\$37,500	\$0	\$0	\$0	\$0	\$0
1002693 STD Duke University P.O. Box 90581 Durham, NC 27708-0581 To provide for Trinity Colleges needed bascd aid and general operating fund.	\$0	\$900	\$900	\$0	\$0	\$0	\$0	\$0
1002484 STD Eastern Star Missionary Baptist Church dba New Horizon Church 5750 East 30th Street Indianapolis, IN 46218 To support the Land and Building Initiative.	\$0	\$42,255	\$42,255	\$0	\$0	\$0	\$0	\$0
1002372 STD Educational Media Foundation 5700 West Oaks Boulevard Rocklin, CA 95765 To support KLOVE radio.	\$0	\$525	\$525	\$0	\$0	\$0	\$0	\$0
1002486 STD Educational Media Foundation 5700 West Oaks Boulevard Rocklin, CA 95765 To provide support for K-LOVE radio.	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Special Gifts

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002675 STD Equal Justice America 13540 E. Boundary Road, Building II Suite 204 Midlothian, VA 23112 To provide access to needed legal services to poor and underserved populations who otherwise could not afford it.	\$0	\$240	\$240	\$0	\$0	\$0	\$0	\$0
1002901 STD Estes Park Learning Place, The 600 South Street Vrain Avenue Unit 2 Estes Park, CO 80517 To provide unrestricted support.	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
1002817 STD Estes Park Non Profit Resource Center, Inc. P.O. Box 4221 Estes Park, CO 80517 To provide for the general support.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
1002789 STD Excelencia in Education, Inc. 1752 N Street Northwest 6th Floor Washington, DC 20036 To continue to enhance the completion agenda for Latino Students.	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
1002356 STD Faith Presbyterian Church 8170 Hague Road Indianapolis, IN 46256 To provide general support for debt reduction.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002406 STD Families First 615 North Alabama Street Suite 320 Indianapolis, IN 46204-1481 To provide for social services.	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002703 STD Families First 615 North Alabama Street Suite 320 Indianapolis, IN 46204-1481 To provide for the general support.	\$0	\$3,900	\$3,900	\$0	\$0	\$0	\$0	\$0
1002943 STD Families First 615 North Alabama Street Suite 320 Indianapolis, IN 46204-1481 To provide for general support.	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
1002774 STD First Christian Church (Disciples of Christ) 1507 Glendale Boulevard Valparaiso, IN 46383 To support the general need in memory of Eloise H. Grich.	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
1002477 STD First Christian Church of Bargersville P.O. Box 15 101 East Street Bargersville, IN 46106 To provide support where most needed.	\$0	\$6,192	\$6,192	\$0	\$0	\$0	\$0	\$0
1002657 STD First Christian Church of Bargersville P.O. Box 15 101 East Street Bargersville, IN 46106 To provide general support.	\$0	\$3,750	\$3,750	\$0	\$0	\$0	\$0	\$0
1002875 STD First Christian Church of Bargersville P.O. Box 15 101 East Street Bargersville, IN 46106 To support the general need.	\$0	\$2,970	\$2,970	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002874 STD Fistula Foundation, The 1910 The Alameda, Suite 500 San Jose, CA 95126 To support the work of surgeries.	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
1002935 STD Florida International University MARC 540 11200 Southwest 8th Street Miami, FL 33199 To provide for the Educational Leadership Enhancement Program, directed by Barbara Bader.	\$0	\$2,250	\$2,250	\$0	\$0	\$0	\$0	\$0
1002743 STD Florida Studio Theatre, Inc. 1241 North Palm Avenue Sarasota, FL 34236 To provide for the general support.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
1002363 STD Foundation for Lutheran Child and Family Services Indiana Inc. 1525 North Ritter Avenue Indianapolis, IN 46219 To provide support for music programs.	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
1002684 STD Franklin College of Indiana 101 Branigin Boulevard Franklin, IN 46131 To provide for operating support/Franklin fund.	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
1002950 STD Girls Incorporated of Greater Indianapolis 3935 North Meridian Street Indianapolis, IN 46208-4011 To provide for general support.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002362 STD Give Kids The World 210 South Bass Road Kissimmee, FL 34746 To provide general operating support.	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
1002422 STD Gleaners Food Bank of Indiana, Inc. 3737 Waldemer Avenue Indianapolis, IN 46241 To support the food bank.	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
1002396 STD Golden Retriever Reserve & Community Education, Inc (GRRACE) P.O. Box 513 Plainfield, IN 46168 To provide general operating support for homeless animals.	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
1002373 STD Goodwill Education Initiatives, Inc. 1635 West Michigan Street Indianapolis, IN 46222 To provide general support for the school.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002391 STD Goodwill Industries of Central Indiana, Inc. 1635 West Michigan Street Indianapolis, IN 46222-3852 To provide support for the charter school.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
1002728 STD Goodwill Industries of Central Indiana, Inc. 1635 West Michigan Street Indianapolis, IN 46222-3852 To provide for the general support.	\$0	\$450	\$450	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002978 STD Goodwill Industries of Central Indiana, Inc. 1635 West Michigan Street Indianapolis, IN 46222-3852 To provide for social services and education.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
1002736 STD Greater Indianapolis Literacy League, Inc. 2450 North Meridian Street Indianapolis, IN 46208 To provide for the general support.	\$0	\$600	\$600	\$0	\$0	\$0	\$0	\$0
1002981 STD Guild, Inc. 130 Wabasha Street South, Suite 90 Saint Paul, MN 55107 To support the Dakota South's location for direct client support, particularly if it would allow an extended stay for those who would benefit from more time at the facility. This gift is in honor of Stephen Chapman and his family.	\$0	\$750	\$0	\$0	\$0	\$0	\$0	\$750
1002933 STD Habitat for Humanity International, Inc. P.O Box 1252 1011 E. 22nd Street Indianapolis, IN 46206-1252 To support the Habitat for Humanity home project sponsored by students from Park Tudor.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
102409 STD Haiti Nursing Foundation P.O. Box 3008 Ann Arbor, MI 48106-3008 To provide support for the nursing school education program.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Special Gifts

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002685 STD Hamilton County Community Tennis Association(HCCTA) 225 East Carmel Drive Carmel, IN 46032 To provide for the HCCTA book program.	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
1002392 STD Heartland Truly Moving Pictures, Inc. Heartland Film Festival 200 S. Meridian St., Suite 220 Indianapolis, IN 46225-1076 To provide general support.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002839 STD Heartland Truly Moving Pictures, Inc. Heartland Film Festival 200 S. Meridian St., Suite 220 Indianapolis, IN 46225-1076 To provide general support.	\$0	\$1,562	\$1,562	\$0	\$0	\$0	\$0	\$0
1002850 STD Heartland Truly Moving Pictures, Inc. Heartland Film Festival 200 S. Meridian St., Suite 220 Indianapolis, IN 46225-1076 To support the art of film making and educational outreach.	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
1002338 STD Heckscher Museum of Art Prime Avenue Huntington, NY 11743-7702 To provide support where most needed.	\$0	\$12,500	\$12,500	\$0	\$0	\$0	\$0	\$0
1002834 STD Heckscher Museum of Art 2 Prime Avenue Huntington, NY 11743-7702 To provide for the general need.	\$0	\$12,000	\$12,000	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Special Gifts

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002546 STD Hillel the Foundation for Jewish Campus Life 2736 Bancroft Way Berkeley, CA 94704 To provide Passover meals for students.	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
1002931 STD Holy Cross Hospital, Inc. 4725 North Federal Highway Fort Lauderdale, FL 33308 To provide support solely for the work of Dr. Ena Segota.	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
1002370 STD Holy Spirit at Geist Catholic Church 10350 Glaser Way Fishers, IN 46038 To provide general operating support.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002603 STD Holy Spirit at Geist Catholic Church 10350 Glaser Way Fishers, IN 46038 To support the general operating fund.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002759 STD Holy Spirit at Geist Catholic Church 10350 Glaser Way Fishers, IN 46038 To provide for the general support.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002976 STD Holy Spint at Geist Catholic Church 10350 Glaser Way Fishers, IN 46038 To provide general support.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002800 STD Holy Spirit Catholic Church and School 7243 E. 10th Street Indianapolis, IN 46219 To provide general support.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002915 STD Holy Spirit Catholic Church and School 7243 E. 10th Street Indianapolis, IN 46219 To provide for the general support.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002622 STD Hooiser Road Elementary Parent Teacher Organization 11300 E. 121st. St. Fishers, IN 46037 To support educational activities at Hooiser Road Elementary.	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
1002760 STD Horton VNA Hospice Center 2404 Valparaiso Street Valparaiso, IN 46383 To honor the memory of Eloise Grcich.	\$0	\$720	\$720	\$0	\$0	\$0	\$0	\$0
1002500 STD House of Hope Presbyterian Church, The 797 Summit Avenue St. Paul, MN 55105 To provide general support.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
1002447 STD Humane Society for Hamilton County 1721 Pleasant Street, Suite B Noblesville, IN 46060 To provide general support.	\$0	\$4,800	\$4,800	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Special Gifts

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002534 STD Humane Society for Hamilton County 1721 Pleasant Street, Suite B Noblesville, IN 46060 To support the well-being of animals at the Humane Society.	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
1002945 STD Humane Society for Hamilton County 1721 Pleasant Street, Suite B Noblesville, IN 46060 To support the Humane Society's services.	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
1002971 STD Humane Society for Hamilton County 1721 Pleasant Street, Suite B Noblesville, IN 46060 To provide general support.	\$0	\$5,100	\$5,100	\$0	\$0	\$0	\$0	\$0
1002606 STD Humane Society of Indianapolis 7929 North Michigan Road Indianapolis, IN 46268 To support the general fund.	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
1002366 STD Humane Society of the United States 2100 L Street, NW Washington, DC 20037 To provide general operating support.	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
1002421 STD Impact 100 Greater Indianapolis, Inc. P.O. Box 40531 Indianapolis, IN 46240 To support the annual fund.	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011

Special Gifts

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002417 STD Independent Colleges of Indiana, Inc. 3135 North Meridian Street Indianapolis, IN 46208-4717 To support Higher Education access.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
1002680 STD Indiana Amateur Baseball Association 7160 Zionsville Road Indianapolis, IN 46268 To provide for the operating fund.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
1002942 STD Indiana Bar Foundation 230 East Ohio St., Suite 400 Indianapolis, IN 46204 To provide support for general operations.	\$0	\$900	\$900	\$0	\$0	\$0	\$0	\$0
1002358 STD Indiana Children's Wish Fund 6435 Castleway West Drive Suite 130 Indianapolis, IN 46205 To provide direct support to granting children's wishes in honor of Pam Griffin's service to Lumina Foundation and her community.	\$0	\$1,071	\$1,071	\$0	\$0	\$0	\$0	\$0
1002393 STD Indiana Family Institute 155 East Market Street, Suite 307 Indianapolis, IN 46204 To support marriage and relationship counseling.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002904 STD Indiana Grantmakers Alliance, Inc. Suite 1100 Symphony Centre 32 E. Washington Street Indianapolis, IN 46204-3583 To provide support for the Youth Philanthropy Initiative of IN/Eileen Ryan Fund.	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002734 STD Indiana Repertory Theatre, Inc. 140 W. Washington Street Indianapolis, IN 46204	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To provide for the general support.								
1002331 STD Indiana State University Foundation, Inc. 217 N. 6th Gillum Hall 320 Terre Haute, IN 47809	\$3,000	\$0	\$3,000	\$0	\$0	\$0	\$0	\$0
To use \$1,500 of this gift to support the College of Education. The remaining \$1,500 is to support the Indiana outreach G.L.A.M program, founded and directed by Shanel Poole.								
1002729 STD Indiana State University Foundation, Inc. 217 N. 6th Gillum Hall 320 Terre Haute, IN 47809	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
To provide \$1,500 to the College of Education, and \$1,500 to G.L.A.M. for young women.								
1002395 STD Indiana Symphony Society 32 East Washington Street Suite 600 Indianapolis, IN 46204-2919	\$0	\$2,100	\$2,100	\$0	\$0	\$0	\$0	\$0
To provide general support.								
1002620 STD Indiana Symphony Society 32 East Washington Street Suite 600 Indianapolis, IN 46204-2919	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
To provide musical education and family support.								

Annual Report Financial Information - 2011
Special Gifts

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002633 STD Indiana Symphony Society 32 East Washington Street Suite 600 Indianapolis, IN 46204-2919 To provide general operating support.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
1002692 STD Indiana Symphony Society 32 East Washington Street Suite 600 Indianapolis, IN 46204-2919 To provide for symphonic and educational programs.	\$0	\$3,750	\$3,750	\$0	\$0	\$0	\$0	\$0
1002747 STD Indiana Symphony Society 32 East Washington Street Suite 600 Indianapolis, IN 46204-2919 To provide for the general support.	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
1002842 STD Indiana Symphony Society 32 East Washington Street Suite 600 Indianapolis, IN 46204-2919 To provide for the general support.	\$0	\$7,287	\$7,287	\$0	\$0	\$0	\$0	\$0
1002354 STD Indiana University Foundation P.O. Box 500 Bloomington, IN 47402 To provide support for general programs and where most needed.	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
1002378 STD Indiana University Foundation P.O. Box 500 Bloomington, IN 47402 To support the cardiology gift fund.	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Special Gifts

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002384 STD Indiana University Foundation P.O. Box 500 Bloomington, IN 47402 To support the class of 1983.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002411 STD Indiana University Foundation P.O. Box 500 Bloomington, IN 47402 To provide general support to the IU School of Business, Indianapolis for need-based scholarship aid with \$750. The remaining \$750 is to support the School of Health and Rehabilitation Sciences.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002413 STD Indiana University Foundation P.O. Box 500 Bloomington, IN 47402 To provide general support for Journalism School scholarships.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002420 STD Indiana University Foundation P.O. Box 500 Bloomington, IN 47402 To provide general support for the IU School of Law, Indianapolis campus.	\$0	\$9,000	\$9,000	\$0	\$0	\$0	\$0	\$0
1002424 STD Indiana University Foundation P.O. Box 500 Bloomington, IN 47402 To support the Medical School Fellowship program.	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
1002425 STD Indiana University Foundation P.O. Box 500 Bloomington, IN 47402 As a memorial contribution honoring Karen Lake	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002480 STD Indiana University Foundation P.O. Box 500 Bloomington, IN 47402 To provide support for programs as designated by Mr. Bepko. Please refer to the attached list.	\$0	\$36,000	\$36,000	\$0	\$0	\$0	\$0	\$0
1002668 STD Indiana University Foundation P.O. Box 500 Bloomington, IN 47402 To provide general operating support.	\$0	\$9,000	\$9,000	\$0	\$0	\$0	\$0	\$0
1002672 STD Indiana University Foundation 530 West New York Street Indianapolis, IN 46202 To provide for the 2011 Annual Fund.	\$0	\$4,500	\$4,500	\$0	\$0	\$0	\$0	\$0
1002689 STD Indiana University Foundation P.O. Box 500 Bloomington, IN 47402 To provide support for the History Department's general fund and Varsity Club's annual giving.	\$0	\$900	\$900	\$0	\$0	\$0	\$0	\$0
1002690 STD Indiana University Foundation 530 West New York Street Indianapolis, IN 46202 To provide support for the law students and the school's needs.	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
1002697 STD Indiana University Foundation P.O. Box 500 Bloomington, IN 47402 To provide support for the School of Health and Rehabilitation.	\$0	\$450	\$450	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002709 STD Indiana University Foundation P.O. Box 500 Bloomington, IN 47402 To provide support for the Armstrong Foundation in teaching education.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
1002724 STD Indiana University Foundation P.O. Box 500 Bloomington, IN 47402 To provide support for programs as designated by Mr. Bepko. Please refer to the attached list.	\$0	\$39,000	\$39,000	\$0	\$0	\$0	\$0	\$0
1002740 STD Indiana University Foundation P.O. Box 500 Bloomington, IN 47402 To provide support for music education	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
1002803 STD Indiana University Foundation P.O. Box 500 Bloomington, IN 47402 To provide for the Jesse Jones Fund for Head and Neck Cancer Research.	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
1002859 STD Indiana University Foundation P.O. Box 500 Bloomington, IN 47402 To support the IUPUI Music Academy's Scholarship Fund providing music lessons to students whose parents cannot afford their music study.	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
1002388 STD Indianapolis Art Center 820 East 67th Street Indianapolis, IN 46220 To provide general support.	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002730 STD Indianapolis Art Center 820 East 67th Street Indianapolis, IN 46220 To provide for the general support.	\$0	\$450	\$450	\$0	\$0	\$0	\$0	\$0
1002837 STD Indianapolis Museum of Art 4000 Michigan Rd Indianapolis, IN 46208-3326 To provide for the general support.	\$0	\$2,140	\$2,140	\$0	\$0	\$0	\$0	\$0
1002844 STD Indianapolis Zoological Society 1200 West Washington Street Indianapolis, IN 46222 To support the general funds.	\$0	\$9,486	\$9,486	\$0	\$0	\$0	\$0	\$0
1002483 STD Indianapolis-Marion County Public Library Foundation, Inc. P.O. Box 6134 2450 North Meridian Street Indianapolis, IN 46206 To provide general operating support.	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
1002516 STD IndyFeral, Inc. PO Box 30054 Indianapolis, IN 46230-0054 To support IndyFeral and its efforts to protect and care for feral cats.	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
1002833 STD IndyFeral, Inc. PO Box 30054 Indianapolis, IN 46230-0054 To provide support for the homeless and abandoned cats in the community.	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002913 STD IndyFeral, Inc. PO Box 30054 Indianapolis, IN 46230-0054 To provide for the spaying or neutering of feral cats or kittens.	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
1002723 STD Information and Referral Network, Inc 3901 North Meridian Street, Suite 300 Indianapolis, IN 46208 To provide support for the general need.	\$0	\$600	\$600	\$0	\$0	\$0	\$0	\$0
1002870 STD Inheritance of Hope P.O. Box 90 Pisgah Forest, NC 28768 To provide for the general support.	\$0	\$1,035	\$1,035	\$0	\$0	\$0	\$0	\$0
1002907 STD Irwin Academic Center PTA 329 North Irwin Aveune Charlotte, NC 28202 To provide for SmartBoard purchase and installation in Mrs. Lee's class at the school.	\$0	\$600	\$600	\$0	\$0	\$0	\$0	\$0
1002912 STD Irwin Academic Center PTA 329 North Irwin Aveune Charlotte, NC 28202 To provide for the purchase and installation of Smart Board in Mrs. Lee's Math classroom.	\$0	\$1,350	\$1,350	\$0	\$0	\$0	\$0	\$0
1002674 STD Ivy Tech Foundation 50 West Fall Creek Parkway North Drive Indianapolis, IN 46208 To provide financial support for students.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002475 STD James Whitcomb Riley Memorial Association 30 South Meridian Street Suite 200 Indianapolis, IN 46204-3509 To provide general support.	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
1002663 STD James Whitcomb Riley Memorial Association 30 South Meridian Street Suite 200 Indianapolis, IN 46204-3509 To provide general support.	\$0	\$3,750	\$3,750	\$0	\$0	\$0	\$0	\$0
1002487 STD Jewish Federation of the Greater East Bay 2071 Tice Valley Boulevard Walnut Creek, CA 94595 To support cultural arts programming.	\$0	\$7,500	\$0	\$0	\$7,500	\$0	\$0	\$0
1002639 STD Joyce Meyer Ministries, Inc. 700 Grace Parkway Fenton, MO 63026 To provide support for the Hands of Hope.	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
1002559 STD Julian Center, Inc., The 2011 North Meridian Street Indianapolis, IN 46202 To provide support for the legal assistance fund.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002394 STD Juvenile Diabetes Research Foundation - Indiana State Chapter 8440 Woodfield Crossing Boulevard, Suite 201 Indianapolis, IN 46240 To support research programs.	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Special Gifts

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002830 STD Juvenile Diabetes Research Foundation - Indiana State Chapter 8440 Woodfield Crossing Boulevard, Suite 201 Indianapolis, IN 46240 To support the search for a cure to juvenile diabetes.	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
1002374 STD Kiwanis Foundation of Indianapolis, Inc. 320 North Meridian, Suite 1020 Indianapolis, IN 46204 To support college scholarships.	\$0	\$450	\$450	\$0	\$0	\$0	\$0	\$0
1002735 STD Knox College 2 East South Street, K-230 Galesburg, IL 61401 To provide for the Annual Contribution.	\$0	\$6,300	\$6,300	\$0	\$0	\$0	\$0	\$0
1002540 STD Kongsvinger Lutheran Church P.O. Box 97 Donnelly, MN 56235 To support the maintenance for cemetery at Kongsvinger church's in honor the Brandt and Awsumb families.	\$0	\$225	\$225	\$0	\$0	\$0	\$0	\$0
1002732 STD Kongsvinger Lutheran Church P.O. Box 97 Donnelly, MN 56235 To support current or future upkeep and repairs to the cemetery in honor of the Brandt and Awsumb families.	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
1002958 STD La Familia Medical Center P.O. Box 5395 Sante Fe, NM 87502 To provide general operating support.	\$0	\$900	\$900	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Special Gifts

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002368 STD Leukemia & Lymphoma Society, The 1311 Mamaroneck Avenue White Plains, NY 10605	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To provide general support								
1002605 STD Leukemia & Lymphoma Society, The 5845 Richmond Highway, Suite 800 Alexandria, VA 22303	\$0	\$3,750	\$3,750	\$0	\$0	\$0	\$0	\$0
To support research.								
1002444 STD Leukemia and Lymphoma Society 530 Dexter Avenue North # 300 Seattle, WA 98109	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
To provide general support.								
1002914 STD Leukemia and Lymphoma Society 530 Dexter Avenue North # 300 Seattle, WA 98109	\$0	\$15,000	\$15,000	\$0	\$0	\$0	\$0	\$0
To provide research for CLL.								
1002849 STD Leukemia and Lymphoma Society, The 2 Oakwood Boulevard Suite 200 Hollywood, FL 33020	\$0	\$3,990	\$3,990	\$0	\$0	\$0	\$0	\$0
To support the Light the Night of LLS.								
1002404 STD Life Centers 8902 Vincennes Circle, Suite A Indianapolis, IN 45268	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To support the purchase, training, maintenance and operation of ultrasound equipment for Life Centers								

**Annual Report Financial Information - 2011
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002520 STD Linden Hall School for Girls 212 East Main Street Lititz, PA 17543 To support new academic facilities and programs.	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
1002750 STD Little Red Door Cancer Agency, The 1801 N. Meridian Street Indianapolis, IN 46202 To provide for the general support.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
1002974 STD Little Red Door Cancer Agency, The 1801 N. Meridian Street Indianapolis, IN 46202 To provide general support.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
1002659 STD Little Sisters of the Poor of Indianapolis, Inc. 2345 West 86th Street Indianapolis, IN 46260 To provide general support.	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
1002764 STD Little Sisters of the Poor of Indianapolis, Inc. 2345 West 86th Street Indianapolis, IN 46260 To support the general need.	\$0	\$225	\$225	\$0	\$0	\$0	\$0	\$0
1002458 STD Lupus Foundation of America, Indiana Chapter P.O. Box 68467 Indianapolis, IN 46278 To provide general support.	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Special Gifts

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002780 STD Lyme Congregational Church P.O. Box 27 Lyme, NH 03768 To provide for the Bicentennial Capital Campaign to restore the 200 year old church building.	\$0	\$25,000	\$25,000	\$0	\$0	\$0	\$0	\$0
1002676 STD Macalester College 1600 Grand Avenue Saint Paul, MN 55105 To provide for the Annual Fund.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
1002655 STD Make a Wish Foundation 7330 Woodland Drive Suite 201 Indianapolis, IN 46278 To provide general support.	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
1002831 STD March of Dimes Birth Defects 136 E. Market St. Suite 500 Indianapolis, IN 46204 To honor the retirement of Rev. Ted Cutrell.	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
1002832 STD March of Dimes Birth Defects 136 E. Market St. Suite 500 Indianapolis, IN 46204 To honor the christening of Bennett and Nolan Cutrell.	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
1002592 STD March of Dimes Foundation 1345 Ohio Street Terre Haute, IN 47807 To support the March of Dimes program and research efforts on behalf Zeta Phi Beta-Epsilon Kappa Zeta 2011 team totals.	\$0	\$1,743	\$1,743	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Special Gifts

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002744 STD Marian High School 1311 South Logan Street Mishawaka, IN 46544 To support the Knight Capital Campaign.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002890 STD Marine Toys for Tots Foundation 18251 Quantico Gateway Drive Triangle, VA 22172 To provide for the Christmas Donation.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002608 STD Marion County Commission on Youth 3901 North Meridian Street, Suite 201 Indianapolis, IN 46208 To provide general support.	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
1002571 STD Masorti Foundation 475 Riverside Dr., Suite 832 New York, NY 10115 To provide support that will further enhance the work of the Masorti Foundation.	\$0	\$4,500	\$4,500	\$0	\$0	\$0	\$0	\$0
1002960 STD Mayo Foundation 200 1st Street, Southwest Rochester, MN 55905 To provide support for Dr. Neil Kayis' Chronic Lymphocytic (CLL) Leukemia Research.	\$0	\$3,810	\$3,810	\$0	\$0	\$0	\$0	\$0
1002511 STD Mercer County Community College Foundation, Inc 1200 Old Trenton Road Trenton, NJ 08690 To provide support for Public Radio station WWFM.	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Special Gifts

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002386 STD Metropolitan Indianapolis Public Broadcasting 1630 North Meridian Street, Suite 2105 Indianapolis, IN 46202-1437 To support public radio with \$150.00. The remaining \$150.00 is for public television and general support.	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
1002473 STD Metropolitan Indianapolis Public Broadcasting 1630 North Meridian Street, Suite 2105 Indianapolis, IN 46202-1437 To support both radio and TV educational programming.	\$0	\$598	\$598	\$0	\$0	\$0	\$0	\$0
1002543 STD Metropolitan Indianapolis Public Broadcasting 1630 North Meridian Street, Suite 2105 Indianapolis, IN 46202-1437 To support WFYI television and radio programming.	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
1002628 STD Metropolitan Indianapolis Public Broadcasting 1630 North Meridian Street, Suite 2105 Indianapolis, IN 46202-1437 To provide support for public radio.	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
1002715 STD Metropolitan Indianapolis Public Broadcasting 1630 North Meridian Street, Suite 2105 Indianapolis, IN 46202-1437 To provide for the WFYI campaign.	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
1002775 STD Metropolitan Indianapolis Public Broadcasting 1630 North Meridian Street, Suite 2105 Indianapolis, IN 46202-1437 To provide \$487 to the radio station, and \$487 for the TV station	\$0	\$975	\$975	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Special Gifts

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002776 STD Metropolitan Indianapolis Public Broadcasting 1630 North Meridian Street, Suite 2105 Indianapolis, IN 46202-1437 To provide for the general support.	\$0	\$900	\$900	\$0	\$0	\$0	\$0	\$0
1002777 STD Metropolitan Indianapolis Public Broadcasting 1630 North Meridian Street, Suite 2105 Indianapolis, IN 46202-1437 To provide for the general support.	\$0	\$600	\$600	\$0	\$0	\$0	\$0	\$0
1002922 STD Metropolitan Indianapolis Public Broadcasting 1630 North Meridian Street, Suite 2105 Indianapolis, IN 46202-1437 To provide general operating support.	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
1002739 STD Michael J. Fox Foundation for Parkinson's Research Church Street Station P. O Box 780 New York, NY 10008 To support Parkinson's research.	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
1002972 STD Midwest Academy, Inc. 801 Congressional Boulevard, Suite 600 Carmel, IN 46032 To support the financial need-based scholarship fund.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
1002561 STD Mills College 5000 MacArthur Blvd. Oakland, CA 94613 To provide support for the Janet L. Holmgren Presidential Scholarship Fund.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002864 STD Miracle Place Inc 940 North Temple Indianapolis, IN 46201 To provide for the general operating support.	\$0	\$240	\$240	\$0	\$0	\$0	\$0	\$0
1002491 STD Montshire Museum of Science One Montshire Road Norwich, VT 05055-9905 To support the Pavilion Project.	\$0	\$3,750	\$3,750	\$0	\$0	\$0	\$0	\$0
1002810 STD Montshire Museum of Science One Montshire Road Norwich, VT 05055-9905 To provide for the general fund.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
1002542 STD Moody Bible Institute of Chicago 820 North LaSalle Boulevard Chicago, IL 60610 To support the 2011 campaign.	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
1002351 STD Mooreville Consolidated School Corporation 11 West Carlisle Street Mooreville, IN 46158 To support the girls' basketball team in honor of Audra Pieper.	\$300	\$0	\$300	\$0	\$0	\$0	\$0	\$0
1002779 STD Mothers Against Drunk Driving (MADD) 511 East John Carpenter Freeway, Suite 700 Irving, TX 75061 To provide for the general support.	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Special Gifts

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002787 STD Mount Moriah Missionary Baptist Church 2349-51 North Keystone Way Indianapolis, IN 46218 To provide for the operational support for the Community Outreach Initiatives such as weekly Teen Night Outreach, Community Workforce Development, and Community School-Aged Tutoring with Sylvan Learning.	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
1002816 STD Mount Moriah Missionary Baptist Church 2349-51 North Keystone Way Indianapolis, IN 46218 To provide for the general support of the community outreach work.	\$0	\$21,705	\$21,705	\$0	\$0	\$0	\$0	\$0
1002910 STD Mount Moriah Missionary Baptist Church 2349-51 North Keystone Way Indianapolis, IN 46218 To provide general operating support and community ministry.	\$0	\$6,219	\$6,219	\$0	\$0	\$0	\$0	\$0
1002979 STD Mount Moriah Missionary Baptist Church 2349-51 North Keystone Way Indianapolis, IN 46218 To provide community ministry support.	\$0	\$3,510	\$3,510	\$0	\$0	\$0	\$0	\$0
1002889 STD Movember, Inc. P.O Box 2726 Venice, CA 90294 To support Prostate Cancer research and education in honor of Nate Brandt's (id 1541707) fundraising efforts	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002385 STD Mozel Sanders Foundation 709 North Belmont Avenue Indianapolis, IN 46226 To provide general support.	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
1002738 STD Muscular Dystrophy Association 8777 Purdue Road, Suite 235 Indianapolis, IN 46268- To support the 2011 Indianapolis MDA executive's Lock-up of J. David Maas, Lumina's CFO.	\$0	\$1,830	\$1,830	\$0	\$0	\$0	\$0	\$0
1002763 STD Muscular Dystrophy Association 8777 Purdue Road, Suite 235 Indianapolis, IN 46268- To provide for the general support.	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
1002916 STD National Audubon Society 225 Varick Street 7th Floor New York, NY 10014 To provide for unrestricted support.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
1002619 STD National Tuberous Sclerosis Assn., Inc. 801 Roeder Rd. #750 Silver Spring, MD 20910 To support research in find a cure for Tuberous Sclerosis.	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
1002892 STD Nature Conservancy 22 Bridge Street, 4th Floor Concord, NH 03301 To provide unrestricted support.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Special Gifts

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002749 STD New Harmony Project, The P.O. Box 441062 Indianapolis, IN 46244 To provide for the general support.	\$0	\$450	\$450	\$0	\$0	\$0	\$0	\$0
1002946 STD Northern Stage Company PO Box 4287 White River Junction, VT 05001 To provide support without restrictions.	\$0	\$1,875	\$1,875	\$0	\$0	\$0	\$0	\$0
1002671 STD Northwood Christian Church 4550 Central Avenue Indianapolis, IN 46205 To provide for the food bank and ministry of the church.	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
1002416 STD Notre Dame Du Lac, University of Finance Office 1100 Grace Hall Notre Dame, IN 46556-5612 To support the annual fund.	\$0	\$4,500	\$4,500	\$0	\$0	\$0	\$0	\$0
1002429 STD Notre Dame Du Lac, University of Finance Office 1100 Grace Hall Notre Dame, IN 46556-5612 To support educational advancement programs.	\$0	\$15,000	\$15,000	\$0	\$0	\$0	\$0	\$0
1002607 STD Notre Dame Du Lac, University of Finance Office 1100 Grace Hall Notre Dame, IN 46556-5612 To support the Notre Dame community engagement effort in Nnindye, Uganda.	\$0	\$25,000	\$25,000	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002957 STD Notre Dame Du Lac, University of Finance Office 1100 Grace Hall Notre Dame, IN 46556-5612 To support the College of Arts and Letters summer undergraduate experiences program.	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
1002964 STD Notre Dame Du Lac, University of Finance Office 1100 Grace Hall Notre Dame, IN 46556-5612 To support the annual fund.	\$0	\$4,500	\$4,500	\$0	\$0	\$0	\$0	\$0
1002917 STD Open Doors of Washington Township, Inc. PO Box 196 Westfield, IN 46074 To provide for the Thanksgiving food baskets.	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
1002956 STD Open Fields School PO box 53 37 Academy Road Thetford Hill, VT 05074 To support the scholarship program.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
1002502 STD Operation Smile 135 Tidewater Drive Norfolk, VA 23509 To provide general program support.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
1002667 STD Orchard School Foundation 615 West 64th Street Indianapolis, IN 46260 To provide for the general support.	\$0	\$6,000	\$6,000	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Special Gifts

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002496 STD Our Lady of Light Catholic Community 19680 Cypress View Drive Fort Meyers, FL 33967 To provide general support.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002489 STD Our Lady of Lourdes 5333 East Washington Street Indianapolis, IN 46219 To provide support without restriction.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002632 STD Outside the Box, Inc. 5420 North College Avenue Indianapolis, IN 46220 To provide direct operating support to assist the OTB staff in empowering those with disabilities.	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
1002451 STD Oxfam America 226 Causeway Street, 5th Floor Boston, MA 02114 To provide general support.	\$0	\$15,000	\$15,000	\$0	\$0	\$0	\$0	\$0
1002701 STD Permanent Endowment Fund for Martha's Vineyard P.O. Box 1182 Oak Bluffs, MA 02557 To provide scholarships for low income students	\$0	\$48,000	\$48,000	\$0	\$0	\$0	\$0	\$0
1002548 STD Phillips Exeter Academy 20 Main Street Exeter, NH 03833-2460 To support the Ramsden Family scholarship fund at Exeter.	\$0	\$2,000	\$2,000	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Special Gifts

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002328 STD Planned Parenthood of Indiana, Inc. 200 South Meridian Street, Suite 400 P.O. Box 397 Indianapolis, IN 46206 To provide general operating support.	\$375	\$0	\$375	\$0	\$0	\$0	\$0	\$0
1002963 STD Planned Parenthood of Indiana, Inc. 200 South Meridian Street, Suite 400 P.O. Box 397 Indianapolis, IN 46206 To provide general support.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002495 STD Presbyterian Church of Teaneck One Church Street Teaneck, NJ 07666 To provide general support.	\$0	\$6,000	\$6,000	\$0	\$0	\$0	\$0	\$0
1002615 STD President and Trustees of Bates College 2 Andrews Road Lewiston, ME 04240 To support the Bates Fund 2011.	\$0	\$15,000	\$15,000	\$0	\$0	\$0	\$0	\$0
1002706 STD President Benjamin Harrison Foundation 1230 North Delaware Street Indianapolis, IN 46202 To provide for the general support for the Presidential site.	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
1002367 STD PrimeLife Enrichment, Inc. 1078 Third Avenue, Southwest Carmel, IN 46032 To provide general support.	\$0	\$600	\$600	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002698 STD Purdue University 403 West Wood Street West Lafayette, IN 47907 To provide support for the Ringel Gallery.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
1002349 STD Reitz Memorial High School 1500 Lincoln Avenue Evansville, IN 47714 To provide support for the 2010-2011 Annual Campaign.	\$1,500	\$0	\$1,500	\$0	\$0	\$0	\$0	\$0
1002894 STD Reitz Memorial High School 1500 Lincoln Avenue Evansville, IN 47714 To support the 2011 Memorial Campaign.	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
1002814 STD Roscommon High School 702 Lake Street P.O. box 825 Roscommon, MI 48653 To support the RHS Golf Program.	\$0	\$600	\$600	\$0	\$0	\$0	\$0	\$0
1002695 STD Sagamore Institute, Inc. 2902 North Meridian Street Indianapolis, IN 46209-4715 To provide for the general support.	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
1002361 STD Salvation Army, The 3100 North Meridian Street Indianapolis, IN 46208 To provide general operating support.	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002405 STD Salvation Army, The 3100 North Meridian Street Indianapolis, IN 46208 To provide general support.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
1002408 STD Salvation Army, The 3100 North Meridian Street Indianapolis, IN 46208 To provide support for food and shelter.	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
1002742 STD Salvation Army, The 3100 North Meridian Street Indianapolis, IN 46208 To provide for the general support.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002754 STD Salvation Army, The 3100 North Meridian Street Indianapolis, IN 46208 To provide general support.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
1002923 STD Salvation Army, The 1445 West Broward Boulevard Ft. Lauderdale, FL 33312 To provide support without restriction.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002490 STD Save the Children Federation, Inc. 54 Wilten Road Westport, CT 06880 To support efforts to improve children's lives around the world.	\$0	\$1,224	\$1,224	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Special Gifts

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002530 STD Scecina Memorial High School 5000 Nowland Ave Indianapolis, IN 46201 To support need-based financial aid for students.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
1002949 STD Scecina Memorial High School 5000 Nowland Ave Indianapolis, IN 46201 To provide tuition assistance.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
1002443 STD Scholarship America 1550 American Boulevard East, Suite 155 Minneapolis, MN 55425 To provide general support without restriction.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002614 STD Scholarship America P. O. Box 1044 Bloomington, IN 47402 To support programmatic efforts and award scholarships.	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
1002854 STD Scholarship America 1550 American Boulevard East, Suite 155 Minneapolis, MN 55425 To support the Zeta Phi Beta-Upsilon Kappa Zeta scholarship efforts.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
1002459 STD School on Wheels, Corp. 2815 East 62nd Street, Suite 200 Indianapolis, IN 46220 To support volunteer tutors for underprivileged students.	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Special Gifts

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002699 STD School on Wheels, Corp. 2815 East 62nd Street, Suite 200 Indianapolis, IN 46220 To provide for the general support.	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
1002788 STD School on Wheels, Corp. 2815 East 62nd Street, Suite 200 Indianapolis, IN 46220 To provide for operating funds unrestricted.	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
1002353 STD Second Missionary Baptist Church 1400 Oak Street Terre Haute, IN 47807 To provide general support.	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
1002702 STD Second Missionary Baptist Church 1400 Oak Street Terre Haute, IN 47807 To provide general support.	\$0	\$4,500	\$4,500	\$0	\$0	\$0	\$0	\$0
1002783 STD Second Missionary Baptist Church 1400 Oak Street Terre Haute, IN 47807 To help purchase a new organ.	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
1002482 STD Shepherd Community Center, Inc. 4107 East Washington Street Indianapolis, IN 46201 To provide operating support without restriction.	\$0	\$37,500	\$37,500	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002908 STD Shepherd Community Center, Inc. 4107 East Washington Street Indianapolis, IN 46201 To provide support for the Tech High School START Project Band.	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
1002934 STD Sisters of the Blessed Sacrament 1663 Bristol Pike Bensalem, PA 19020 To provide general support without restriction.	\$0	\$2,700	\$2,700	\$0	\$0	\$0	\$0	\$0
1002469 STD Smile Train, The 41 Madison Avenue, 28th Floor New York, NY 10010 To provide general operating support.	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
1002939 STD Somos Un Pueblo Unido 1804 Espinacitas Street Santa Fe, NM 87505 To provide general support.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
1002426 STD Southern Poverty Law Center 400 Washington Avenue Montgomery, AL 36104 To support the Center efforts to fight hate groups and support acceptance of diversity.	\$0	\$270	\$270	\$0	\$0	\$0	\$0	\$0
1002470 STD Southport Presbyterian Church 7525 McFarland Boulevard Indianapolis, IN 46227 To support the Parent's Day Out Ministries	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002968 STD Southport United Methodist Church 1947 East Southport Road Indianapolis, IN 46227 To provide general support.	\$0	\$315	\$315	\$0	\$0	\$0	\$0	\$0
1002807 STD Southside Animal Shelter 1614 West Edgewood Avenue Indianapolis, IN 46217 To provide general support.	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
1002448 STD Southside Youth Council, Inc. 3505 North Washington Boulevard Indianapolis, IN 46205 To support teen court and juvenile justice system.	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
1002531 STD Special Olympics of Indiana 9425 North Meridian Street #237 Department # 11329 Indianapolis, IN 46260 To support the general operating fund.	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
1002773 STD Special Olympics of Indiana 9425 North Meridian Street #237 Department # 11329 Indianapolis, IN 46260 To support the general operating fund.	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
1002967 STD St. Charles Borromeo School 2224 East 3rd Street Bloomington, IN 47401 To support the 2011-2012 wish list contribution.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002572 STD St. Ignatius College of Chicago 1076 W. Roosevelt Rd. Chicago, IL 60608 To provide support for the service learning fund.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002390 STD St. Ignatius College Prep 1076 West Roosevelt Road Chicago, IL 60608 To support the Annual fund without restriction.	\$0	\$4,500	\$4,500	\$0	\$0	\$0	\$0	\$0
1002895 STD St. Joseph Montessori School 933 Hamlet Street Columbus, OH 43201 To support the 2011-2012 E-Newsletter.	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
1002461 STD St. Jude's Children Research Hospital 501 St. Jude Place Memphis, TN 38015 To provide general operating support.	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
1002629 STD St. Jude's Children Research Hospital 501 St. Jude Place Memphis, TN 38015 To support the general operating fund.	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
1002746 STD St. Jude's Children Research Hospital 501 St. Jude Place Memphis, TN 38015 To provide unrestricted support.	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Special Gifts

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002336 STD St. Jude's Children Research Hospital 501 St. Jude Place Memphis, TN 38015 To provide support for Leukemia Research.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002478 STD St. Luke's United Methodist Church 100 West 86th Street Indianapolis, IN 46260 To provide support for the library and learning/teaching resources.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
1002713 STD St. Luke's United Methodist Church 100 West 86th Street Indianapolis, IN 46260 To provide for books and general support for the Jean Elepko Library and Education Center.	\$0	\$3,750	\$3,750	\$0	\$0	\$0	\$0	\$0
1002840 STD St. Luke's United Methodist Church 100 West 86th Street Indianapolis, IN 46260 To provide for the garden.	\$0	\$1,562	\$1,562	\$0	\$0	\$0	\$0	\$0
1002880 STD St. Mary Catholic Parish in Breckenridge P.O. box 2670 Breckenridge, CO 80443 To provide for the Capital Campaign.	\$0	\$6,000	\$6,000	\$0	\$0	\$0	\$0	\$0
1002492 STD St. Matthew Catholic Church 4100 East 56th Street Indianapolis, IN 46220 To support the Kathleen Lang Hahn Memorial Fund.	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Special Gifts

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002397 STD St. Therese (Little Flower) Catholic Church 4720 East 13th Street Indianapolis, IN 46201 To provide general operating support.	\$0	\$4,050	\$4,050	\$0	\$0	\$0	\$0	\$0
1002398 STD St. Therese (Little Flower) Catholic Church 4720 East 13th Street Indianapolis, IN 46201 To support the Heifer International project.	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
1002399 STD St. Therese (Little Flower) Catholic Church 4720 East 13th Street Indianapolis, IN 46201 To support activities of the Social Justice Ministry.	\$0	\$225	\$225	\$0	\$0	\$0	\$0	\$0
1002597 STD St. Therese (Little Flower) Catholic Church 4720 E. 13th St. Indianapolis, IN 46201 To support the general operating fund.	\$0	\$4,050	\$4,050	\$0	\$0	\$0	\$0	\$0
1002598 STD St. Therese (Little Flower) Catholic Church 4720 E. 13th St. Indianapolis, IN 46201 To provide general operating support.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
1002599 STD St. Therese (Little Flower) Catholic Church 4720 E. 13th St. Indianapolis, IN 46201 To provide general support.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Special Gifts

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002500 STD St. Therese (Little Flower) Catholic Church 4720 E. 13th St. Indianapolis, IN 46201 To support social justice ministry.	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
1002501 STD St. Therese (Little Flower) Catholic Church 4720 E. 13th St. Indianapolis, IN 46201 To support the Miracle Place Indianapolis sponsoring committee.	\$0	\$240	\$240	\$0	\$0	\$0	\$0	\$0
1002765 STD St. Therese (Little Flower) Catholic Church 4720 East 13th Street Indianapolis, IN 46201 To support the Dominican Province of Nigeria.	\$0	\$120	\$120	\$0	\$0	\$0	\$0	\$0
1002766 STD St. Therese (Little Flower) Catholic Church 4720 East 13th Street Indianapolis, IN 46201 To provide for the general operating support.	\$0	\$4,050	\$4,050	\$0	\$0	\$0	\$0	\$0
1002767 STD St. Therese (Little Flower) Catholic Church 4720 East 13th Street Indianapolis, IN 46201 To provide for the general operating support.	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
1002768 STD St. Therese (Little Flower) Catholic Church 4720 East 13th Street Indianapolis, IN 46201 To support the work of our parish and community.	\$0	\$1,800	\$1,800	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Special Gifts

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002384 STD St. Tereese (Little Flower) Catholic Church 4720 East 13th Street Indianapolis, IN 46201 To provide for the general support.	\$0	\$4,050	\$4,050	\$0	\$0	\$0	\$0	\$0
1002547 STD Starfish Initiative 814 North Delaware Street, Suite A Indianapolis, IN 46204 To provide general operating support.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002821 STD Starfish Initiative 814 North Delaware Street, Suite A Indianapolis, IN 46204 To provide for unrestricted general support.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002883 STD Starfish Initiative 814 North Delaware Street, Suite A Indianapolis, IN 46204 To provide for the general fund.	\$0	\$6,000	\$6,000	\$0	\$0	\$0	\$0	\$0
1002658 STD Sturtevant Press Law Center 1101 Wilson Blvd. Suite 1100 Arlington, VA 22209 To provide general operating support.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
1002375 STD Summit County Family Resource Center PO Box 4056 Dillon, CO 80435 To support the general fund and annual campaign.	\$0	\$600	\$600	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Special Gifts

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002381 STD Summit County Family Resource Center PO Box 4056 Dillon, CO 80435 To provide for the general support.	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
1002388 STD Susan G. Komen Breast Cancer Foundation 205 N Michigan Avenue Suite 2630 Chicago, IL 60601 To provide support for Laura Noone's participation in the 3-Day for the Cure in Phoenix, Arizona.	\$0	\$360	\$360	\$0	\$0	\$0	\$0	\$0
1002589 STD Susan G. Komen for the Cure Central Indiana 3500 DePauw Boulevard Suite 2070 Indianapolis, IN 46268 To provide breast health services to Indiana residents and support life saving research.	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
1002590 STD Susan G. Komen for the Cure Central Indiana 3500 DePauw Boulevard Suite 2070 Indianapolis, IN 46268 To support general operations.	\$0	\$855	\$855	\$0	\$0	\$0	\$0	\$0
1002449 STD Susquehanna University 514 University Avenue Selinsgrove, PA 17870 To support educational advancement programs.	\$0	\$17,500	\$17,500	\$0	\$0	\$0	\$0	\$0
1002642 STD Teach for America 315 West 36th Street, 8th floor New York, NY 10018 To provide support for TFA-Indianapolis Region.	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Special Gifts

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002379 STD Teach Plus, Inc. 374 Congress Street Suite 502 Boston, MA 02210 To provide support for teacher education.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002376 STD The ALS Association Indiana Chapter 6525 East 82nd. Street Suite 115 Indianapolis, IN 46250 To support research for a cure to ALS.	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
1002526 STD The Mind Trust 407 W. Fulton Street, Suite 102 Indianapolis, IN 46202 To provide general support.	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
1002977 STD The Salvation Army 736 West Main Street Lexington, KY 40508 To provide for families in need at Christmas.	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
1002580 STD The Trustees of the University of Pennsylvania 433 Franklin Building 2451 Walnut Street Philadelphia, PA 19104-6285 To honor the reappointment of Dean Mike Fitts.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
1002959 STD The University of Texas MD Anderson Cancer Center PO Box 4486 Houston, TX 77210 To provide support for Dr. S. O'Brien's Chronic Lymphocytic (CLL) Leukemia Research.	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Special Gifts

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002716 STD The V Foundation 106 Towerview Court Cary, NC 27513 To provide for the general support.	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
1002330 STD Think New Mexico 1227 Paseo de Peralta Santa Fe, NM 87501 To provide general operating support.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
1002357 STD Thomas Jefferson School of Law 1155 Island Avenue San Diego, CA 92101 To use at your discretion to expand the new law school building to include faculty and student meeting offices.	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
1002503 STD Tideveell Hospice 5955 Rand Boulevard Sarasota, FL 34238 As a contribution to the Bain Memorial.	\$0	\$225	\$225	\$0	\$0	\$0	\$0	\$0
1002617 STD Trustees of Dartmouth College 6066 Development Office Hanover, NH 03755 To support endowments that will be restricted to undergraduate scholarships	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
1002637 STD Trustees of Indiana University, The 535 W. Michigan Street, IT 378 Indianapolis, IN 46202 To provide support for the scholarship fund.	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Special Gifts

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002711 STD Uniform Law Foundation 111 North Wabash Avenue Suite 100 Chicago, IL 60602 To provide for the general support of the law development work of the Uniform Law Commissioners.	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
1002494 STD Union Hospital Foundation 1606 North 7th Street Terre Haute, IN 47804 To support scholarships.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
1002407 STD United Negro College Fund 3737 North Meridian Street, Suite 203 Indianapolis, IN 46208 To provide support for scholarships.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002412 STD United Negro College Fund 3737 North Meridian Street, Suite 203 Indianapolis, IN 46208 To support WellPoint's (Team Ford) participation in Bowling for Scholars.	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
1002418 STD United Negro College Fund 3737 North Meridian Street, Suite 203 Indianapolis, IN 46208 To provide general support.	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
1002415 STD United Services Organization, Inc. 2111 Wilson Boulevard, Suite 1200 Arlington, VA 22201 To support annual Christmas giving.	\$0	\$600	\$600	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Special Gifts

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002457 STD United Services Organization, Inc. 2111 Wilson Boulevard, Suite 1200 Arlington, VA 22201 To provide general support.	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
1002906 STD United Services Organization, Inc. 2111 Wilson Boulevard, Suite 1200 Arlington, VA 22201 To support the general fund.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002567 STD United States Fund for UNICEF 125 Maiden Lane New York, NY 10038 To provide support for the Haitian Children's relief fund	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
1002441 STD United Way of Central Indiana, Inc. 3901 North Meridian Indianapolis, IN 46208 To support the United Christmas Service.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002630 STD United Way of Central Indiana, Inc. 3901 North Meridian Indianapolis, IN 46208 To support contributions to the Julian Center.	\$0	\$1,125	\$1,125	\$0	\$0	\$0	\$0	\$0
1002654 STD United Way of Central Indiana, Inc. 3901 North Meridian Indianapolis, IN 46208 To provide support for the Early Readers Club.	\$0	\$168	\$168	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002710 STD United Way of Central Indiana, Inc. 3901 North Meridian Indianapolis, IN 46208 To provide support for the United Way Campaign.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
1002836 STD United Way of Central Indiana, Inc. 3901 North Meridian Indianapolis, IN 46208 To provide general support.	\$0	\$9,833	\$9,833	\$0	\$0	\$0	\$0	\$0
1002361 STD United Way of Central Indiana, Inc. 3901 North Meridian Indianapolis, IN 46208 To support designated charities in the United Way Fund.	\$0	\$1,125	\$1,125	\$0	\$0	\$0	\$0	\$0
1002373 STD United Way of Lee County, Inc 7273 Concourse Drive Fort Myers, FL 33908 To support the 2011 annual giving.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002321 STD University of Dubuque 2000 University Avenue Dubuque, IA 52001 To provide support for the Fine and Performing Arts Center.	\$30,000	\$0	\$30,000	\$0	\$0	\$0	\$0	\$0
1002541 STD University of Dubuque 2000 University Avenue Dubuque, IA 52001 To provide support for the Fine and Performing Arts Center.	\$0	\$30,000	\$30,000	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Special Gifts

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002403 STD University of Portland, The 5000 N. Willamette Blvd Portland, OR 97203-5798 To support educational advancement programs.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002583 STD University of Texas at Austin P.O. Box 7458 Austin, TX 78713 To support the University of Texas.	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
1002802 STD University of Texas at Austin P.O. Box 7458 Austin, TX 78713 To the Communication College Leadership Program to continue to train future leaders.	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
1002909 STD University Schools Foundation P.O. Box 336785 Greeley, CO 80633 To provide unrestricted support.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
1002940 STD Upper Valley Land Trust 19 Black Road Hanover, NH 03755 To provide general support without restriction.	\$0	\$1,125	\$1,125	\$0	\$0	\$0	\$0	\$0
1002991 STD Vigo County Public Schools Education Foundation, Inc. 686 Wabash Avenue P.O. Box 3703 Terre Haute, IN 47808 To provide general support.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002355 STD Wheeler Mission Ministries 205 East New York Street Indianapolis, IN 46204 To provide food and shelter for those in need.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002464 STD Wheeler Mission Ministries 205 East New York Street Indianapolis, IN 46204 To support any need.	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
1002758 STD Wheeler Mission Ministries 205 East New York Street Indianapolis, IN 46204 To provide for the general support.	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
1002926 STD Wheeler Mission Ministries 205 East New York Street Indianapolis, IN 46204 To provide for the general operating support.	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
1002364 STD White House Fellows Foundation and Association 1800 Massachusetts Avenue, Northwest Suite 400 Washington, DC 20036 To provide general support without restriction.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
1002707 STD Wishard Memorial Foundation, Inc. Myers Building - Room 1022 1001 West Tenth Street Indianapolis, IN 46202 To provide support healthcare for the underserved.	\$0	\$3,921	\$3,921	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Special Gifts

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002643 STD Xavier University of Louisiana 1 Drexel Drive New Orleans, LA 70125-1098 To provide support for the chapel at St. Katharine Drexel.	\$0	\$15,000	\$15,000	\$0	\$0	\$0	\$0	\$0
1002718 STD Yale University Assoc Supervisor, Contribution Processing P.O.Box 2038 New Haven, CT 06521-2038 To provide for the general support.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
1002517 STD YMCA of Greater Indianapolis 615 N. Alabama Street Suite 200 Indianapolis, IN 46204 To support the Ruth Lilly YMCA Outdoor Center and the Y for All Campaign.	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
1002371 STD Young Audiences of Indiana, Inc. 3921 North Meridian Street Indianapolis, IN 46208-4011 To provide general support.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002453 STD Young Life P.O. Box 520 Colorado Springs, CO 80901 To support Young Life operations in Costa Rica (acct. x3164/Campbell). No part of this gift may be assigned to Ali Campbell's salary or personal benefits.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002454 STD Young Life P.O. Box 520 Colorado Springs, CO 80901 To support Young Life operations in Costa Rica (acct. x8164/Campbell). No part of this gift may be assigned to Ali Campbell's salary or personal benefits.	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
1002513 STD Young Life P.O. Box 520 Colorado Springs, CO 80901 To support Young Life operations in Costa Rica (acct. x3164 /Campbell) as a match to January and February 2011 donations. No part of this gift may be assigned to Ali Campbell's salary or personal benefits.	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
1002652 STD Young Life P.O. Box 520 Colorado Springs, CO 80901 To support Young Life operations in Costa Rica (acct. x8164 /Campbell) as a match to January and February 2011 donations. No part of this gift may be assigned to Ali Campbell's salary or personal benefits.	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
1002781 STD Young Life P.O. Box 520 Colorado Springs, CO 80901 To support Young Life operations in Costa Rica (acct. x8164 /Campbell) as a match to May, June, and July 2011 donations. No part of this gift may be assigned to Ali Campbell's salary or personal benefits.	\$0	\$225	\$225	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002969 STD Young Life P.O. Box 520 Colorado Springs, CO 80901 To support Young Life operations in Costa Rica (acct. x8164 /Campbell) as a match to August and September 2011 donations. No part of this gift may be assigned to Ali Campbell's salary or personal benefits.	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
Total for Matching Gift	\$38,250	\$1,304,006	\$1,334,006	\$0	\$7,500	\$0	\$0	\$750
Sponsorship - Donate Table								
1002576 STD American Cancer Society Great Lakes Division, Inc Central Indiana Service Center 5635 West 96th Street Indianapolis, IN 46278 To support the 2011 Westfield Relay for Life.	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
1002463 STD American Heart Association 6100 W. 96th Street Indianapolis, IN 46278 To support the American Heart Association's Jump Rope for Heart event to be held on February 14, 2011 at Charles L. Smith Elementary School, sponsoring Robbie Morales.	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
1002772 STD American Indian College Fund 8333 Greenwood Boulevard Denver, CO 80221 To support the 2011 Annual Flame of Hope Gala.	\$0	\$2,500	\$2,500	\$0	\$0	\$0	\$0	\$0
1002762 STD Arts Council of Indianapolis, Inc. 924 North Pennsylvania Street Indianapolis, IN 46204 To support the 25th Annual Start with Art Business and Arts Luncheon, Paint the Town, on September 1, 2011	\$0	\$600	\$600	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Special Gifts

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Sponsorship - Donate Table								
1002479 STD Association Venezolanos En Indiana Corporation P.O. Box 3100 Carmel, IN 46032 To sponsor the Venezuelan Association Gala Party that will be held on May 14, 2011.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002721 STD Ball State University Social Science Research Center Ball State University Muncie, IN 47306 To sponsor Guardian Scholars' Welcome Back to School reception in September 2011.	\$0	\$2,500	\$2,500	\$0	\$0	\$0	\$0	\$0
1002504 STD Brotherhood/Sister Sol Incorporated 512 West 143rd Street New York, NY 10031 To support the 2nd annual educational panel on March 29, 2011.	\$0	\$2,500	\$2,500	\$0	\$0	\$0	\$0	\$0
1002756 STD Carmel Education Foundation 5201 East Main Street Carmel, IN 46033 To support the 3rd Annual Ghosts and Goblins 5k/2K and Wellness fair on Saturday, October 29, 2011.	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
1002434 STD Center for Leadership Development, Inc. 2425 Dr. Martin Luther King Jr. Street Indianapolis, IN 46208-5546 To support the Minority Business and Professional Achievers Recognition Awards Dinner on March 16, 2011	\$0	\$2,500	\$2,500	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Special Gifts

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Sponsorship - Donate Table								
1002624 STD Center for Leadership Development, Inc. 2425 Dr. Martin Luther King Jr. Street Indianapolis, IN 46208-5546 To support the 4th Annual CLD College Prep Conference and College Fair on July 23, 2011.	\$0	\$2,500	\$2,500	\$0	\$0	\$0	\$0	\$0
1002720 STD Central Indiana Community Foundation 615 N Alabama St., Suite 119 Indianapolis, IN 46204 To support the Indiana Latino Scholarship Fund Dinner held on July 29, 2011.	\$0	\$2,500	\$2,500	\$0	\$0	\$0	\$0	\$0
1002610 STD Coalition of Urban and Metropolitan Universities 8000 York Road Towson, MD 21252 To support the 17th Annual Conference at the Silver level in recognition of IUPUI and other CUMU institutions as key partners in success work.	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
1002669 STD Community Alliance of the Far Eastside, Inc. 8902 East 38th Street Indianapolis, IN 46226 To support the CAFE Annual Dinner/Far Eastside's Got Talent on November 17, 2011.	\$0	\$500	\$500	\$0	\$0	\$0	\$0	\$0
1002682 STD Community Foundation of Morgan County To support OneRoad Back to School 2011.	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
1002682 STD Community Foundation of Morgan County To support the OneRoad to Christmas Morning 2011 campaign.	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Special Gifts

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Sponsorship - Donate Table								
1002585 STD Dyslexia Institute of Indiana, Inc. 8395 Keystone Crossing, Suite 102 Indianapolis, IN 46240 To support the annual Indiana Authors Breakfast.	\$0	\$850	\$850	\$0	\$0	\$0	\$0	\$0
1002437 STD Emerging Pearls Foundation, Inc. P.O. Box 44004 Indianapolis, IN 46244 For general sponsorship.	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
1002941 STD Emerging Pearls Foundation, Inc. P.O. Box 44004 Indianapolis, IN 46244 To support the 2011 Books & Breakfast with Santa literacy initiative.	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
1002532 STD Fathers and Families Resource/Research Center, Inc. 2835 N. Illinois Street Indianapolis, IN 46208 To support the Annual Faces of Fatherhood Luncheon.	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
1002751 STD Fathers and Families Resource/Research Center, Inc. 2835 N. Illinois Street Indianapolis, IN 46208 To support Fatherhood Luncheon June 2012.	\$0	\$200	\$200	\$0	\$0	\$0	\$0	\$0
1002933 STD Grantmakers for Effective Organizations 1725 DeSales Street Suite 404 Washington, DC 200036 To provide general support for the conference and offsetting attendance costs for new practitioners.	\$0	\$5,000	\$0	\$0	\$0	\$0	\$0	\$5,000

**Annual Report Financial Information - 2011
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Sponsorship - Donate Table								
1002896 STD Greater Indianapolis Progress Committee 200 East Washington Street, Suite 1901 Indianapolis, IN 46204 To provide support for the Mayor's Celebration for Diversity Awards Luncheon on Friday, January 11, 2012.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002488 STD Habitat for Humanity International, Inc. P.O Box 1252 1011 E. 22nd Street Indianapolis, IN 46206-1252 To support the Homeowner Education Program and construction projects in Center Township.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002521 STD Indiana Black Exp, Inc. 3145 North Meridian Street Indianapolis, IN 46208 To support Indiana Black Expo's Fourth Annual Statewide Education Conference July 13-14, 2011	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
1002536 STD Indiana Black Expo, Inc. 3145 North Meridian Street Indianapolis, IN 46208 To support Circle City Classic 2011.	\$0	\$500	\$500	\$0	\$0	\$0	\$0	\$0
1002450 STD Indiana Partnerships Center 921 East 86th Street, Suite 108 Indianapolis, IN 46240 To support the Dads Expo event that will be held on May 21, 2011	\$0	\$2,500	\$2,500	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Sponsorship - Donate Table								
1002823 STD Indiana State Fair Commission Administration Building 1202 East 38th Street Indianapolis, IN 46205 To provide support for the 16th annual Safe Night Halloween Trunk or Treat event on October 31, 2011.	\$0	\$500	\$500	\$0	\$0	\$0	\$0	\$0
1002847 STD Indianapolis Downtown, Inc. Chase Tower 111 Monument Circle, Suite 1900 Indianapolis, IN 46204 To support Downtown Indianapolis 2011 efforts.	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
1002867 STD Indianapolis Professional Association P.O. Box 20712 Indianapolis, IN 46220 To provide support for the 2011 IPA's Annual Youth Empowerment Breakfast on December 11, 2011.	\$0	\$2,500	\$2,500	\$0	\$0	\$0	\$0	\$0
1002948 STD Indianapolis Public Schools 2405 Madison Avenue Indianapolis, IN 46225 To support the Manual High School Band Department.	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
1002868 STD John H. Boner Community Center, Inc. 236 East 10th Street Indianapolis, IN 46201 To provide support for John H. Boner Community Center's Big Birthday Bash on November 12, 2011.	\$0	\$2,000	\$2,000	\$0	\$0	\$0	\$0	\$0
1002741 STD John H. Bonner Center 7254 Haverhill Court Indianapolis, IN 46250 To support parents finding non-costly ways to prepare their child for the first day of school.	\$0	\$250	\$250	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Sponsorship - Donate Table								
1002973 STD Juvenile Diabetes Research Foundation 26 Broadway New York, NY 10004 To provide general support.	\$0	\$4,000	\$4,000	\$0	\$0	\$0	\$0	\$0
1002524 STD Kids Wish Network, Inc. P.O. Box 91859 Orlando, FL 32891-8959 To support the Kids Wish Network's Funeral Assistance Program in Indiana.	\$0	\$245	\$245	\$0	\$0	\$0	\$0	\$0
1002537 STD La Plaza, Inc. 8902 East 38th Street Indianapolis, IN 46226 To support La Plaza's 6th Annual Night of the Americas event.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
1002541 STD Madame Walker Theatre Center 617 Indiana Avenue, # 4 Indianapolis, IN 46202 To support the Steward and Associates 2011/2012 Speaker Series.	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
1002531 STD Marion County Commission on Youth, Inc. 3901 North Meridian Indianapolis, IN 46208 To support the formation of a Youth Advocacy Council.	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
1002857 STD Metropolitan Indianapolis Public Broadcasting 1630 North Meridian Street, Suite 2105 Indianapolis, IN 46202-1437 To support the WFYI challenge grant for the 2011 Fall Membership Campaign	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Sponsorship - Donate Table								
1002824 STD Metropolitan School District of Wayne Township 3820 West Bradbury Avenue Indianapolis, IN 46241 To recreate a learning opportunity for the 2011-2012 school year by having Mr. Nick Bruel, the creator of the series, Bad Kitty, present to the students.	\$0	\$500	\$500	\$0	\$0	\$0	\$0	\$0
1002325 STD Pacer's Basketball Corporation Foundation 125 South Pennsylvania Street Indianapolis, IN 46204 To provide 40 tickets to underserved youth to attend a Fever game at Conseco Fieldhouse in honor of Colleen C'Brien	\$0	\$414	\$414	\$0	\$0	\$0	\$0	\$0
1002467 STD Perry Township Education Foundation, Inc. 6548 Orinoco Avenue Indianapolis, IN 46227 To support the 2011 PTFP Golf Outing that will be held on June 16, 2011.	\$0	\$1,200	\$1,200	\$0	\$0	\$0	\$0	\$0
1002468 STD Planned Parenthood of Indiana, Inc. 200 South Meridian Street, Suite 400 P.O. Box 397 Indianapolis, IN 46206 To sponsor the Gathering of Goddesses and Gods events that will be held on April 16, 2011.	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
1002609 STD Roman Catholic Archdiocese of Indianapolis 1400 N. Meridian Street Indianapolis, IN 46202-2367 To support the Celebrating Catholic School Values: Scholarship and Career Achievement Awards Dinner at the Bronze level. This gift is given in recognition of service to your organization by Holiday H. McKiernan, an officer of Lumina Foundation.	\$0	\$1,750	\$1,750	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Sponsorship - Donate Table								
1002784 STD Rural Community College Alliance 2801 North Main Street Altus, OK 73521 To support the Rural Community College Alliance Conference on September 26-28, 2011 in Oklahoma City.	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
1002466 STD Salvation Army, The 3100 North Meridian Street Indianapolis, IN 46208 To support the local Salvation Army Social Services Center and Shelter, in honor of Brownie Troop 2454.	\$0	\$2,500	\$2,500	\$0	\$0	\$0	\$0	\$0
1002322 STD Salvation Army, The 3100 North Meridian Street Indianapolis, IN 46208 To support the 2011 Bob Gregory's Coats for Kids campaign.	\$0	\$500	\$500	\$0	\$0	\$0	\$0	\$0
1002438 STD Scholarship America, Inc. P.O. Box 3402 Evansville, IN 47733 To support the 2nd Annual Strawberries & Champagne Gala & Silent Auction that will be held on February 12, 2011.	\$0	\$1,700	\$1,700	\$0	\$0	\$0	\$0	\$0
1002752 STD Sociedad Amigos De Colombia De Indiana Inc. P.O. Box 1141 Carmel, IN 46082 To support the SADCO 27th Anniversary Sponsorship Program	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Sponsorship - Donate Table								
1002522 STD Special Olympics of Indiana 9425 North Meridian Street #237 Department # 11329 Indianapolis, IN 46260 To support Indiana's Special Olympics program.	\$0	\$540	\$540	\$0	\$0	\$0	\$0	\$0
1002523 STD St. Therese (Little Flower) Catholic Church 4720 East 13th Street Indianapolis, IN 46201 To support Summerfest 2011 at Little Flower Catholic Church.	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
1002381 STD Starfish Initiative 814 North Delaware Street, Suite A Indianapolis, IN 46204 To support the Starfish Initiative Back to School Expo that will be held on 7/30/11.	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
1002660 STD Trustees of Indiana University, The 719 Indiana Avenue, Suite 130 Indiana, IN 46202 To support the 12th Annual Indiana Achievement Awards on September 28, 2011.	\$0	\$2,500	\$2,500	\$0	\$0	\$0	\$0	\$0
1002588 STD Vigo County Public Schools Education Foundation, Inc. 36 Wabash Avenue P.O. Box 3703 Terre Haute, IN 47808 To support the 25th annual Vigo County Education Foundation "Excellence in Education" banquet on May11, 2011.	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0

**Annual Report Financial Information - 2011
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Sponsorship - Donate Table								
1002770 STD YMCA of Greater Indianapolis 615 N. Alabama Street Suite 200 Indianapolis, IN 46204 To support the 2011 Y-Achievers Scholarship Banquet on behalf of Meresa Creekmore-Armor.	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
Total for Sponsorship - Donate Table	\$0	\$123,249	\$118,249	\$0	\$0	\$0	\$0	\$5,000
United Way Lumina Match								
1003072 STD United Way of Central Indiana, Inc. 301 North Meridian Indianapolis, IN 46208 To pay Lumina's corporate match for the 2011 United Way Campaign.	\$0	\$64,482	\$64,482	\$0	\$0	\$0	\$0	\$0
Total for United Way Lumina Match	\$0	\$64,482	\$64,482	\$0	\$0	\$0	\$0	\$0
VIP Gift								
1002579 STD Coburn Place Safehaven II, Inc. 604 East 38th Street Indianapolis, IN 46205 To provide safe affordable housing for women and children.	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
1002556 STD Eastern Star Missionary Baptist Church dba New Horizon Church 5750 East 30th Street Indianapolis, IN 46218 To provide support for Growing in God-Giving in Faith Capital Stewardship Program.	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
1002544 STD Families First 615 North Alabama Street Suite 320 Indianapolis, IN 46204-1481 To provide for general support.	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0

Annual Report Financial Information - 2011
Special Gifts

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
VIP Gift								
1002476 STD First Christian Church of Bargersville P.O. Box 15 101 East Street Bargersville, IN 46106 To provide support where needed.	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
1002365 STD Indianapolis Zoological Society 1200 West Washington Street P.O. Box 22309 Indianapolis, IN 46222 To provide general support.	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
1002595 STD Information and Referral Network, Inc 3901 North Meridian Street, Suite 300 Indianapolis, IN 46208 To provide support where needed.	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
1002613 STD Scholarship America P. O. Box 1044 Bloomington, IN 47402 To support programmatic and scholarship efforts.	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
1002653 STD Student Press Law Center 1101 Wilson Blvd. Suite 1100 Arlington, VA 22209 To provide general operating support.	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
Total for VIP Gift	\$0	\$8,000	\$8,000	\$0	\$0	\$0	\$0	\$0
Total for Standard Special Gifts	\$38,250	\$1,811,237	\$1,836,237	\$0	\$7,500	\$0	\$0	\$5,750
Grand Total	\$38,250	\$1,811,237	\$1,836,237	\$0	\$7,500	\$0	\$0	\$5,750

Lumina Foundation For Education
Tax Return for Year Ending

December 31, 2011

Tax ID 35-1813228

Form 990 PF

Statement Number 19

Part I Line 19

Depreciation

Description				
	(A)	(B)	(C)	(D)
	Expense per books	Net Investment Expense	Adjusted Net Income	Disbursements for charitable purposes (cash basis only)
Asset Life (Years)				
Computer Equipment	3 \$ 134,050	\$ 11,071	\$ 0	0
Furniture and Equipment	5-10 111,135	9,181	0	0
Leasehold Improvements	10 years 387,129	31,970	0	0
	(Term of lease)			
	\$ <u>632,314</u>	\$ <u>52,222</u>	\$ <u>0</u>	<u>0</u>

Lumina Foundation For Education

Tax ID 35-1813228

Tax Return for Year Ending

December 31, 2011

Form 990 PF

Part IV

Line 1

Capital Gain and Losses for Tax on Investment Income

Statement Number 20

a) List and describe the kind(s) of property sold	b) How Acquired	c) Date Acquired	d) Date Sold	e) Gross Sales Price	g) Cost	h) Gain or (Loss)
Total Publicly Traded Securities				\$ 548,718,000		\$ 33,679,144
K - 1 Gains				N/A		6,696,755
Total				<u>\$ 548,718,000</u>		<u>\$ 40,375,899</u>

Lumina Foundation For Education**Tax ID 35-1813228****Tax Return for Year Ending****December 31, 2011****Form 990 PF****Part VII-A Line 11****Statement Regarding Activity****Statement Number 21**

Name and Address of Controlled Entity	Employer Identification Number	Description of Transfer	Amount of Transfer
SCHF I-3 Investor LLP 7 Pilgrim Street London, EC4V 6LB, England	20-3406345	Cash Investment	0
Lumina Investments LLC is the General Partner in SCHF I-3.	20-3405024	Cash Investment	0
Lumina Foundation for Education, Inc is a limited Partner in SCHF I-3			

Expenditure Grants

Statement Number

22

Part VII-B

Line 5c

Exemption - Expenditure Grants

Name /address	Amount of Grant	Date of Grant	Purpose of Grant	Amount Expended by Grantee	To the Grantor's Knowledge, Grantee has diverted a portion of funds from the purpose of the grant (Yes/No)	Date of Reports Received from the Grantee	Dates and Results of Any Verification of the Grantee's Reports	Information
CommunicationWorks, LLC 1752 N Street, Northwest, 6th Floor Washington, DC 20036	\$ 900,000	6/1/2010	To develop communicatin activities and products that strengthen the ability of states to graduate more students within existing resources while maintaining academic quality	\$352,117	No	Interim reports - 1st 02/02/2011, 2nd report 9/30/2011; Did not disburse final \$200,000, close grant 6/30/12 Receive unspent refund 4/30/11 \$163,986	Reviewed and approved interim reports	\$700,000 of grant disbursed 06/04/2010, Additional \$100,000 scheduled for August 2011 and final \$100,000 scheduled for August 2012 These disbursement not made
HCM Strategists, LLC 429 3rd Street, Northeast Washington, DC 20001	\$ 2,829,500	7/7/2010	To manage state contracts and coordinate technical support for Lumina Foundation's productivity initiative	\$760,210	No	Interim reports - 1st 02/28/2011, 2nd interim report 1/31/12	Reviewed and approved interim reports	\$327,300 of grant distursed 7/30/2010, Modified disbursement scheduled as follows 02/2011 - \$387,000, 8/2011 - \$389,200, 03/2012 - \$837,000 and final 01/2013 - \$889,000
Mathematica Policy Research 600 Maryland Avenue, Southwest Suite 550 Washington, DC 20024	\$ 350,000	6/11/2011	To continue the process and summative evaluation of Lumina's Minority Serving Institutions - Models of Success (MSI-MS) program	86,285	no		Reviewed and approved interim reports	\$275,000 disbursed 06/11/2011, Remaing \$75,000 scheduled for 4/30/2012